UNTAPPED:

How Community Organizers Can Develop and Deepen Relationships with Major Donors and Raise Big Money
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Produced by The Linchpin Campaign
Marjorie Fine, Director

The Linchpin Campaign
Linchpin is a project of the Center for Community Change (CCC), which seeks to expand the resources available to community organizing efforts in the United States. Linchpin aims to persuade a wider range of donors and funders to support organizing and assists community organizing groups in effectively communicating the impact of community organizing.

Center for Community Change
The mission of CCC is to develop the power and capacity of low-income people, especially low-income people of color, to change their communities and public policies for the better. Founded in 1968 to honor Robert F. Kennedy, CCC strengthens community organizing groups and helps them unite across the dividing lines of race, geography, organizational affiliation, and issue priority to advance progressive public policy change. CCC generates new ideas and voices to energize the progressive movement and to increase civic engagement among low-income people and people of color.

Marjorie Fine
Marjorie Fine leads Linchpin. She is the former executive director of the Unitarian Universalist Veatch Program at Shelter Rock and a long time grantmaker, organizer, activist, and fundraiser. Marjorie founded Linchpin from the belief that community organizing skills naturally lend themselves to raising money from individuals. At the same time, she saw that community organizers and leaders needed support in order to fully incorporate major donors into their fundraising strategies. She conceived of this guide as a way to share the observations and insights from her hands-on research and a formal Linchpin donor survey, along with her frequent presentations and trainings throughout the United States—all aimed at helping community organizing groups tap into the available resources for their work.

Please contact Marjorie Fine at mfine@communitychange.org or 212-643-3464 x101.

For more information about The Linchpin Campaign and the Center for Community Change, please visit the CCC Web site at www.communitychange.org.

Written by Joan Minieri
Joan Minieri is the co-author of the award winning book, Tools for Radical Democracy: How to Organize for Power in Your Community. She co-founded Community Voices Heard, for which she received a Leadership for a Changing World award from the Ford Foundation and was the founding co-director of the New York City Organizing Support Center, where she received a Union Square Award for her training skills and organizational leadership. Her additional writing includes guides on power and constituent engagement as well as documentation reports with the Research Center for Leadership in Action at New York University.

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THIS GUIDE AND WHO IT IS FOR

Community organizing works. This guide is for those who know that best: the organizers and leaders who already have what they need in their success stories, direct experiences, and toolbox of skills to demonstrate to donors who give big money that what they do is a wise investment.

In Untapped we examine how to apply the basics of community organizing to raising money from major donors. We begin with an overview of the potential and the challenges of major donor fundraising. We introduce Linchpin’s formal survey of major donors and review our other sources of information. We go on to describe different types of major donors, how and where to find them, and some key things to keep in mind about major donor fundraising.

At the heart of Untapped is an examination of each of the five main findings from the Linchpin survey and the implications for organizers, leaders, and those raising money for community organizing. We include sample scenarios, talking points, and organizing examples.

We conclude with a summary and appendices. There you can find a sample scenario for cultivating a major donor, reference information, and a list of other resources.

“When organizers start asking individuals for money, they quickly realize that fundraising is a form of organizing.”
—Stephanie Roth, Klein and Roth Consulting, and cofounder of GIFT: Grassroots Institute for Fundraising Training

Please note that most of the information we gathered for this guide was confidential, to allow donors and fundraisers to be as forthright as possible about sharing their views. This is why, while we identify some individuals and organizations by name, particularly support organizations, most organizers and major donors remain anonymous. Although some would be comfortable being identified alongside their comments, we chose to handle all of the attributions in a consistent manner.

We speak directly to community organizers here, and generally refer to the community organizing representative as “the organizer.” At the same time, other staff members as well as leaders have important roles in major donor fundraising. The roles that various people take on vary from organization to organization. A leader could be a low-income parent who is involved in education organizing for the first time or the long-time pastor of a neighborhood congregation. A staff member could range from a development director to an executive director. Especially in the sample scenarios, you can generally replace references to “the organizer” with the term that reflects your situation, such as “leader” or “board member” or “director,” or anyone in your organization whose role includes building donor relationships.

We truly hope that Untapped and the work of The Linchpin Campaign prove useful to anyone who raises money for community organizing.
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ORGANIZERS CAN RAISE MONEY FROM MAJOR DONORS:
An Introduction to The Potential and The Challenges

Consider the Real Potential.
Community organizing attracts considerable financial support from major donors, pointing to a viable and important opportunity for those raising money for organizing. Ninety-four percent of over 100 private, mostly progressive donors we formally surveyed give to community organizing. However, those same donors give more elsewhere. Forty-two percent of those we surveyed focus less than 25 percent of their giving on organizing.

Individual donors provide a substantial amount of support to nonprofit organizations overall.

The Giving USA Foundation estimates that individual giving amounted to nearly three-quarters of all giving in 2007. While this includes all types of nonprofits, including religious congregations, with social change organizations representing just one area, it speaks to the importance of individuals as a funding source.

In the Linchpin survey, over half of the donors we surveyed give at least $100,000 annually, and over one-third give at least $500,000. Nearly all of the donors we surveyed contribute at least $10,000 each year.

This is the first major survey to show that community organizers have earned the trust and respect of donors. However, while many view community organizing as critical for achieving social change, few have a long-term giving strategy to support community organizing.

The potential for organizers to raise money from these individuals is clearly untapped.

Aim Higher than What the Average Member Can Give: Who is a Major Donor?
A major gift is a financial donation that has the potential to make a real difference in the development, planning, and success of your organization. A major gift is an investment in your organization’s vision. It could be $500 or $1,000,000, depending on the organization. An individual who makes consistent gifts of a magnitude you determine to be particularly significant to your organization is the type of major donor we consider in this guide. When determining the characteristics of a major donor for your organization, think beyond the amount of money an average member of the organization can give. Keep in mind that many major donors are accustomed to thinking big when it comes to money.

A prospective major donor for your organization is someone who: believes in your cause, has money to give, and is someone to whom you or someone working with you has access. For an overview of how to identify potential major donors, see page 10.

Show Your Impact and Effectiveness.
The Linchpin donor survey suggests that some major donors who support community organizing are not giving to organizing efforts at higher levels because they believe it is difficult to measure its impact and they don’t seem to be seeing what it all adds up to—the big-picture outcomes that community organizing achieves.

Organizers can address these perceptions head-on, and many are effectively doing so. In this guide, you will find sample phrases, examples, and tips for engaging major donors. For more on measuring impact and seeing the big picture, see page 27.

I think [community organizing] is an essential component when it comes to creating social change, PERIOD. There is nothing that it is not well suited for.

—major donor
Provide a Bridge: Link Your Work with Donor Interests.

Major donors support organizations that help them to achieve their goals in their areas of interest. You can connect with a donor who shares your organization’s interests but may not yet support organizing by creating a bridge. You can offer examples that link your work to the top issues a donor cares about and to the priorities that motivate the donor. For more about creating “bridge” statements, see page 22.

Connect Emotionally through Stories.

Relating stories about your work and what you do is an important way to connect with donors. While they want to know that your work is effective, many donors are moved to support you from their hearts, not by the details of your work plan. Forty-five percent of donors in our survey reported that “a story about a successful organizing effort related to an issue or population I care about” would be the best way to influence their giving. In contrast, 25 percent said that “receiving facts and statistics about the impact of community organizing” would influence them to give more.

Focus on Building Relationships.

Even though many organizers report that what they like least about raising money from individuals is asking for it, you spend a relatively small amount of your time doing that, in proportion to the amount of time you spend cultivating the relationship. Even prospecting and finding people to approach takes a relatively minor amount of time. The vast majority—over 90 percent of individual donor time—goes into building the relationship. One of our goals is to support you in using this time as effectively as possible.

Obtaining and sustaining gifts from major donors requires ongoing cultivation and relationship building. This includes overcoming any potential discomfort you may have relating to a wealthy person. Keep in mind that a donor with the means to become a major donor could live anywhere, be of any culture, race, or gender, and could have money to give for any number of reasons. Your major donor fundraising will be more effective if you take the time to consider your preconceptions, as well as the dynamics of how you think and feel about money and people who have money and how your own experiences shape your thinking. For more on relationship building with donors and the dynamics of money, see page 10.

Using One-on-One Meeting Skills for Major Donor Fundraising.

Organizers who raise big money from donors cite the usefulness of a tool that many already use in other aspects of their work: the one-on-one meeting. For those who may be less familiar with this technique, in a one-on-one meeting (in this case with a prospective donor), the organizer sits down for a face-to-face conversation with the donor and listens in order to understand who the person is and what motivates her or him.

The organizer asks open-ended questions that require more than a “yes” or “no” answer. An example of a one-on-one question that is useful for better understanding the interests of a potential donor is simply “What are you passionate about?” or “What keeps you up at night?” The organizer primarily listens—actively listens. An active listener is able to repeat back what the donor says, demonstrating understanding. The organizer may or may not agree with the donor, but indicates that she or he is listening. The organizer makes eye contact, minimizes distractions by turning off a cell phone or radio, and notices and uses positive body language and other nonverbal signals, such as sitting in a relaxed position and smiling, and nodding. Listening is contagious. The donor will feel more open to what the organizer is saying if she or he feels understood.

The organizer primarily listens, but also shares some of her or his motivations as well, sometimes in the form of a story. For example, an organizer fighting for workers’ rights might describe her father’s involvement in a labor union as a motivation. An organizer who at one time worked as a nurse may use that experience to illustrate his interests in creating a more equitable health care system. A leader who is mobilizing to win better wages may describe what it was like to learn that workers in a neighboring county earn much more money for doing the same job.

The deep listening that is integral to an effective one-on-one meeting helps to establish or deepen the relationship between the donor and the organizer. The assessment skills that a good one-on-one meeting fosters lead to the organizer’s ability to make connections between the donor’s interests and the organization’s work and activate that relationship as a public force.
“‘Change not charity’ – it’s a good slogan and a good policy. It’s these local organizations that accomplish change that the bureaucracy is helpless to do.”

—major donor

FOUR STEPS OF MAJOR DONOR FUNDRAISING.

There are four primary steps for raising money from major donors: 1) prospecting, 2) cultivating relationships, 3) asking for money, and 4) thanking donors for their support and engaging in ongoing stewardship of the relationship. (While the steps in major donor fundraising are ongoing, at times you may run a six-to-eight week campaign.) The steps apply across approaches and issue areas and are well-documented, so we do not focus on the overall process in this guide. For some suggested resources and how-to guides for moving through all of the steps, see Appendix Three.
INFORMATION SOURCES

Formal Donor Survey.
We conducted a formal survey of private major donors from throughout the country in early 2007 via the networks of over twenty foundations and organizations that support progressive social change causes. They agreed to distribute over 1,000 surveys, and 189 donors responded. The findings we report here are based on 108 surveys that had all the questions answered—a 10 percent response which the survey team considered a significant return.

For more information about this survey, please see Appendix One.

Personal Interviews and Ongoing Information Gathering.
Prior to conducting the formal survey, in 2005 and 2006, Marjorie Fine, Linchpin director, personally interviewed 160 donors, foundation staff, donor advisors, community organizers, and others, exploring a range of topics related to individual giving for community organizing. In addition, Fine continually conducts workshops and panel presentations for donors, organizers, and funders, and engages in conversations with them on an ongoing basis. For more on Marjorie Fine, please see page 2.

We also gained valuable insights from several individuals while developing Untapped, as we note in our acknowledgments in Appendix Three.

Countless efforts for social change have benefited from the work of many organizers and fundraising professionals. In particular we note the publications, multimedia tools, convenings, trainings, and consultations provided by Priscilla Hung, Kim Klein, Stephanie Roth, the Grassroots Fundraising Journal and GIFT (Grassroots Institute for Fundraising Training). For information for these resources, see Appendix Three.

Through our own efforts and in partnership with others, we continue to develop our understanding of who gives to organizing and how organizers effectively build relationships with major donors.

“[Community organizing is] a process that actively engages the members of a community in advancing their common interests and promoting the collective good.”

—working definition of community organizing used in our survey
WHO ARE MAJOR DONORS?

Donors Have Priorities for Their Giving.

Major donors to community organizing fall into several broad categories. Sometimes their giving overlaps more than one category. Being aware of these categories can help you to figure out the best way to approach and talk with a specific donor. Sample categories include the following:

**POLITICAL/ELECTORAL DONORS** give to candidates and toward civic engagement efforts to increase voter registration and voter participation, for example. When we asked donors in the Linchpin survey to rank their top areas of interest, they ranked this area third overall.

**ISSUE-BASED DONORS** give to address the issues that most concern them. In our survey, the top interest area donors cited was economic justice and poverty, followed by environment, civil rights and political participation, and education.

**DONORS CONCERNED WITH COMMUNITY LIFE AND LEADERSHIP** give to aid a local community’s improvement or for the improvement of a city, and toward efforts that offer training and opportunities for community-based leaders.

**CONSTITUENCY-BASED DONORS** give to organizations that address the interests of the constituency they are most moved to support. Seventy percent of donors we surveyed said their giving supported women; 69 percent said racial, ethnic, or tribal communities; 67 percent said children or youth; and 52 percent said immigrants. About 50 percent said their giving benefited LGBT individuals.

**FAITH-BASED DONORS** give to institution- or congregation-based organizing or to efforts with an explicit spiritual values base. Around 25 percent of donors we surveyed reported contributing to support people of faith as a constituency.

**SOCIAL VENTURE DONORS AND NEWLY WEALTHY ENTREPRENEURS** give to a wide range of interests. It may seem counterintuitive to approach someone whose core work is to build a profitable business, but it is important not to overlook these potential donors. For example, these types of donors are used to taking risks. They may be more open to an approach that they are less familiar with, such as community organizing, if it resonates with their values and concerns. They often know first hand what it takes to get things done. They know why you need a good Web site and a database to build your infrastructure, and decent salaries to sustain an effective staff. With this type of donor, you can think about the specific role she or he can play in supporting your work. While these characteristics can be true of anyone, they particularly apply to social venture donors.

**YOUNG PEOPLE WITH INHERITED WEALTH** may be figuring out where they can be most effective. This type of donor may start by giving to services in an area of interest that reflects her or his own experiences as a student, volunteer, or camp counselor, leading to support for a scholarship fund or an after-school or camp program. But this type of donor may be very open to hearing about your organizing to improve the public education system or exploring other methods of structural change. “Young people with inherited wealth have many different stories of where the money comes from, how long it has been in the family, and what their class upbringing or class culture is,” says Rodney McKenzie, Jr. executive...
director of Resource Generation, a national organization that works with young people with financial wealth to deepen their social engagement and understand their role as philanthropists. “Equally diverse are the ways they feel about the money, ranging from guilt to responsibility, entitlement to a sense of possibility.” Young donors in particular engage with the work broadly and serve in every role, from organizer to donor to fundraiser.

**DONORS ARE “NICE.”** One organizer who cultivates major donors in a range of these categories notes that the organizers he works with would rather do anything than ask people for money. “They will ask people to drive hours to go to a meeting at the state capitol, or to come in and make a hundred phone calls, but they will do anything to avoid asking people for money. It’s funny, because major donors are really nice,” he laughs. “They’re interested in us and what we do, they love meeting regular people from the community who are leaders; they sometimes even offer you lunch and tea. These conversations are not argumentative,” he says. “We go in prepared, of course. We have the three things we want to get out of the meeting, and who will play what role, just like when we meet with a legislator or a reporter. The donor may say ‘I’m sorry, we have different interests,’ but compared to a lot of other meetings organizers put together, meeting with donors is really very pleasant.”It is pretty normal to like the other aspects of what you do more than asking for money. It may help to keep in mind that as happy as an organization is to get a major gift, the donor is just as happy to give it. In our interactions with donors and with the organizers who work with them, the picture of a major donor that consistently emerges is one of an approachable person who wants to do something useful with her or his money.

**MAJOR DONORS ARE DIFFERENT FROM FOUNDATIONS.** While many aspects of raising money from foundations are similar to raising money from major donors, there are some differences. Individuals have priorities and interests, but they tend to be driven by the heart. Their giving is not guided by the same kinds of mission statements and established goals that foundations have.

Where staff members represent foundations, individuals generally represent themselves, possibly with the support of an assistant or a financial advisor. You can approach individuals directly to build a relationship or ask them to increase their giving.

Individuals tend to be less formal than foundations in how they consider gifts, and they have no cutoff dates or waiting periods—they can fund you whenever they want for as long as they want, and give as much as they want to give. Some individuals give more money over the course of a year than foundations do.

“Working with major donors can be so much easier than writing a ten-page proposal or writing funding reports with all sorts of graphs and charts about outcomes,” says one longtime community organizing director. “Often, major donors make quicker decisions than foundations. Phone calls and visits with donors can replace a pile of paperwork. Donors often continue to increase their donation as they learn more about the work. In addition, donors are often more willing to make multiyear commitments or to make monthly pledges that help cash flow.”

**DONORS MAY HAVE FAMILY FOUNDATIONS.** If a donor is also connected with a family foundation, you may be able to approach her or him as an individual and also through the foundation. The goals of the donor’s family foundation may match yours, and family foundations sometimes have money that individual family members can access at their discretion. It is important to be sensitive to the appropriate channels of communication. For instance, if you are going to approach the foundation, it is generally best to follow the foundation’s guidelines—don’t bypass the staff and go directly to the donor, even if you have a relationship with the donor. Similarly, an individual donor may have a donor-advised fund that is staffed by a fund manager. In that case, you would approach the fund manager for a major gift.

**IT’S NOT ALL ABOUT MONEY.**

All of the gifts of a major donor, including her or his time, advice, and connections, can support your organization and be long-lasting. In this way, major donor fundraising is really a form of organizing. You build a base of engaged people who bring resources but can also provide support in other ways.

The best relationships with major donors are not just focused on making a financial transaction. As one organizer puts it, “We are not picking the donor’s pockets. We are not selling a used car. Our donors can give us access; they can connect us to other donors; they have ideas. These are real relationships.”
PEOPLE GIVE TO PEOPLE. PEOPLE ARE COMPLEX. Relationships with major donors are, first and foremost, relationships. They require time and commitment to cultivate. Individuals have idiosyncrasies, yet every potential donor is worth getting to know. Even those who seem different from you can share your goals, value your organization’s constituents, and believe in your work. As many organizations acknowledge, even within their own memberships, not everyone agrees on everything. Yet people find ways to work together based on the values and goals they share.

“People are complex,” suggests one organizer who regularly cultivates major donor relationships. “Progressive organizers tend to ignore people’s complexity just because people are on the other side in some areas.” For instance, you and the donor may not agree about a social agenda, but that same donor may be extremely upset about how local schools are failing and how this is making the region economically uncompetitive. In forging a relationship with this donor, you can look for the broad connections, the threads you can pull from what she or he is concerned about. You can talk about

THE DYNAMICS AROUND MONEY.

In major donor fundraising, staff and leaders directly confront their fears around asking for money or their preconceptions about people who have money to give. Some think, for example, that if they need to approach someone of a different race or from a different economic class, they will be in a world they don’t know and won’t know how to act. “I won’t know what fork to pick up at lunch” is how one organizer put it.

Knowing what your own fears, feelings, or preconceptions are and coming to terms with them internally is important for being able to leave them at the door and work with major donors. You can start by thinking about your own background and experience with money and how that may influence you in your fundraising role. What has the role of money been in your own life?

Often organizers believe that donors see them in certain ways—as beggars or as people whose time is not as valuable as that of donors. Raising money from major donors is not begging. What we hear from donors is that they understand that it is your job to approach them. They know that you need to raise money to do your work, and you have to get it from somewhere.

It can help to simply make a list of what you think the donor thinks about you and talk about it with another person in your organization, as a way of trying to come to terms with it. You can also list and talk about your assumptions about the donor. It’s common to anticipate that a donor will act a certain way based on her or his wealth, race, or gender, especially if these are different than your own. These assumptions may or may not turn out to be true, but if you are going to have a real, productive relationship with a donor, knowing who she or he is as an individual is essential. Organizers sometimes apply their anger at injustice to anger at people with wealth, believing that people with money to give have done something wrong to get that money. In order to meet a potential donor in the most fair and conducive place possible, understanding any of these kinds of thoughts and feelings you might have, and finding some other place to put them, makes a difference in your effectiveness.

Another dynamic to consider is that a donor may not necessarily be from a completely different world than yours or your organization’s members’. Major donors can come into money in a range of ways and may donate a significant portion of what could be considered a relatively modest income. People who give big money come from all cultural, racial, gender, and professional backgrounds.

Organizers sometimes see some donors as people they would never ally with if it was not for the money. Or they fear that major donors are looking to get overly involved and directive about the organization’s work. This is why getting to know a donor as a complex person with a range of ideas, goals, motivations, and gifts to contribute is essential for determining where you would like to try to fit that person in relationship with your organization and into your fundraising base.

Facing your fears and feelings, getting to know an individual with wealth, forging a relationship, looking her or him in the eye, directly asking for money, and continuing to build on your connection not only strengthens your fundraising ability, but shifts the power dynamics around money itself. This is true for organizers and leaders alike.
how your organization gets public school parents—who share the donor’s concerns—involved in making the public school system stronger and more effective.

Even if a donor is on another side of the political spectrum, or even opposes some piece of your organization’s agenda, you can directly acknowledge: “We don’t agree on everything, but we do agree on many things when it comes to what kids in this community need. And your gift will help us make those kids’ futures brighter.”

**RELATIONSHIPS REQUIRE ONGOING PERSONAL CONTACT.** It is essential to stay in close personal contact with each donor. Ultimately, you want yours to be one of the top organizations the donor cares about and is committed to supporting. The closer the personal contact, the more likely it will lead to sustained giving.

You can simply ask the donor which type of contact she or he prefers. Some only want e-mail. Others like to hear from you or members by phone. Some prefer to get a hard copy of the newsletter in their mailbox and have coffee with you once a year. Similarly, some want public recognition. Others wish to remain anonymous. Once you know what the donor wants, you can follow those preferences.

“The more people are afraid of or intimidated by me, the less they tell me the truth and the harder it is to truly connect. Every room I walk into, I am seen as holding the checkbook to solve everyone’s problems. Sometimes I feel like I’m going to die from all the people who want money from me. But if that’s the price for [my] engagement and self-respect, I’m willing to pay it.”

—major donor
WHAT DONORS SAY,
AND THE IMPLICATIONS FOR ORGANIZERS

The following statistics reflect the views of the donors who completed the formal survey we distributed through progressive social change funding networks. For more on the Linchpin survey, please see Appendix One. The implications for organizers, examples, and talking points draw as well on Marjorie Fine’s interviews and ongoing conversations with donors, donor advisors, organizers, and other supporters of community organizing.

Throughout this section, while we primarily cite the organizer as the representative of the organization, many of the statements we use as examples could instead be spoken or adapted by development staff or by leaders from the organization’s membership.

Linchpin Survey: Finding One

Major Donors Do Open Their Wallets to Community Organizing and They Can Give More

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<td>• <strong>GIVE TO ORGANIZING.</strong> Ninety-four percent of the donors we surveyed make financial contributions to community organizing.</td>
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<td>• <strong>BELIEVE IN ORGANIZING.</strong> More than nine in ten respondents believe community organizing can play a critical role in achieving their goals for their giving.</td>
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<td>• <strong>HAVE MORE TO GIVE.</strong> Nearly half (42 percent) give less than 25 percent of their annual donations to community organizing.</td>
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Implications for Organizers: Identifying Major Donors

Move individuals into relationship with your organization and move them up the giving ladder.

Start Inside.

Finding prospective major donors whose purpose matches yours begins inside and works its way out. You may already have a set of prospects, but for those just starting out with this type of fundraising, you can begin with the members of your organization and make a list of who they know. The following is an example of questions you could list on a worksheet, asking members to think about a set of indicators that make sense for your situation.

1) Who demonstrates that they value our work, by coming to our events or asking you for information about our work? Who shows potential interest, for example, through what they do for a living or where they volunteer?

2) Whose giving patterns in other areas suggest they are “givers” and have money to give? Who attends local fundraisers, donates auction items, or gives to organizations that work on similar issues?

3) Who knows, loves, or supports you, and would potentially be open to extending that relationship to include supporting our organization?

The following suggests some brainstorming categories. For some of these, you can also keep in mind the networks you and others in the organization already are part of via online social media tools, such as Facebook.

It is important to not limit your brainstorming with preconceived ideas about who gives, in terms of race, class, gender, or neighborhood. People from all racial, ethnic, and gender groups, who live in all different communities and come from all walks of life, can and do give, and give big.
As you build your list, you can prioritize where you want to focus first:

**ORGANIZATION MEMBERS AND STAFF.** Who within the organization can be tapped to become what you define as a major donor?

**FAMILY MEMBERS AND FRIENDS.** Who can you connect with among the family members and friends of your organization’s members and staff? Your goal is to begin to develop a relationship that is not just based on individual loyalty, but a relationship with the organization. They begin to give because they love you, and continue to give because they are connected to the work.

**BUSINESS CONTACTS/AFFILIATIONS.** Include those with whom your members and your organization do business. You can approach both the business owner and the business itself. Consider every place from local restaurants to office supply stores to funeral parlors, both large and small businesses and corporations. Include local medical practices, real estate agencies, beauty parlors, accounting firms, and other professional services. You are not prospecting for favors from these businesses; you are looking to identify new relationships with individuals who support what your organization does for the community.

Sometimes union memberships or trade organizations can be similar sources for potential relationships, with the head of a union, for example, being a potential personal donor.

**THOSE WHO HAVE MOVED OR ARE NO LONGER ACTIVE.** Include members, board members, and community allies who have moved away or are no longer actively involved. This gives those who still care but can’t be involved the chance to stay connected and those who have moved the chance to still support the work back home. This can include people who made money in your neighborhood with a small business but have since moved away.

**LOCAL POLITICIANS.** You can go to politicians you have worked with and ask both for their direct support and for names of people they know who you can approach. One organization was able to identify new donors by asking defeated candidates for public office to send a letter to their donors, asking them to support the organization as a way to achieve some of their goals.

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**THE BEST CONTACTS: THOSE WHO ALREADY GIVE.**

An individual who already gives to you or to other organizing efforts at low levels offers the best potential to move from being an “impulse giver” to becoming a thoughtful, major donor. Similarly, those who already give at a high level can move from giving on impulse to giving more steadily, and giving more. Those donors have shown that they value community organizing. They have also proven their ability and willingness to make financial contributions.

Moving people up in their giving really does work. Review your relationships regularly, and when a donor has been consistent, consider asking for more.

Also, when your organization brings in new donors who give to honor a friend at an annual awards event, for example, plan out how you will cultivate and keep them as donors. This is an example of engaging those you know are willing and able to make donations.

**ALLIES.** Your allies at the foundations that fund your work, clergy whose members participate in your organization or benefit from your work, and community organizations that you’ve worked with can all potentially give you names of major donor contacts.

**THOSE WHO ALREADY GIVE—TO YOUR ORGANIZATION OR OTHERS.** Who already gives $100 or $250 to your organization? Can you move them up the giving ladder to become bigger donors?

Who do your inner contacts know who gives to other community organizing efforts or to support similar issue areas? Who from among those donors can you move into your organization and up that ladder?

No organization owns its donors. Donor information tends to be in the public domain, listed in annual reports and on Web sites. Exploring this with reasonable sensitivity is appropriate. You can review the donor pages of annual reports of organizations that work on your issues as well as gala programs or ad books from their events. Don’t limit your research to community organizing supporters. For example, an organization that provides services for children may give you some potential donors who have moved or are no longer active.
names of people to approach for your campaign to make health care for children and families more affordable—and someone within your organization may know them and be able to make the first contact.

**DONOR CONTACTS.** You can ask current donors for names of potential donors as well. Current donors “are some of the best untapped resources for donor prospects,” suggests Priscilla Hung, executive director of GIFT.

**BUILD OUT INTO THE COMMUNITY.** You can gain access to new relationships—and a sign-in list of potential donors—by speaking at gatherings that have a wide reach of engaged and active community members. You can use these opportunities not necessarily to ask for money on the spot, but to expose people to your issue and the ways you are addressing community problems. Some places to consider include the following:

**CHAMBER OF COMMERCE.** One organizer reports that a presentation to the local Chamber of Commerce offered a key way to access relationships that led to millions of dollars eventually going into community organizing. While this clearly doesn’t happen everywhere, local business associations are definitely sources of potential supporters. Similar gatherings to address might include a Rotary Club meeting, a bankers’ luncheon, or a YMCA staff meeting.

**PLACES OF WORSHIP.** You and your organization’s members can also expose people to your work by speaking at congregation services, events, and social action committees. Nearly every congregation has people of some means. Talking to the faith-based community is an important way to identify donor relationships.

**ALUMNI AND PROFESSIONAL NETWORKS.** Articles in newsletters of colleges that you, staff, or active leaders attended, or professional associations you are part of, promote your organization and may lead to contacts down the line. This includes reaching out through sororities, fraternities, and similar networks.

**COLLEGES AND UNIVERSITIES.** Speaking with a class or at a campus event is another way to put information out there about your work and meet potential donors, even if it is not an appropriate venue to immediately and directly ask for money.

**SOCIALLY RESPONSIBLE INVESTMENT PROFESSIONALS.** You can write to and approach those who have a client base of people who already care about social issues, to get on their radar as a possible contribution to your organization. Or you can ask to present with these professionals when they speak with groups of investors and demonstrate that supporting your organization is a way to give back to the community.

**EXISTING OUTREACH CHANNELS.** Make sure that anyone who looks at your Web site or receives communication from you knows how to easily give to your organization, by clicking on a donation button or mailing back a self-addressed envelope. This is a way to get small donations and to get names of people you can further cultivate.

**DO SOME LIST RECONNAISSANCE.** Regularly pass the list of potential donors to the board of your organization and its fundraising committee. Foundation staff members who support your work can also offer insight into the list. Ask them all to provide as much information as possible about the interests and capacity of the potential donors they know, so you can best determine how to approach each individual.

In addition to cultivating financial support, consider other ways you could strengthen the connection between people on the list and your organization. Who could be a board member? Who might open doors to other donors? Who would be willing to volunteer for a specific task?

**PLAN YOUR APPROACH AND EACH MEETING.** You can develop a plan for approaching each person on the list based on existing relationships, donor interests, and giving history if you already have an individual donor program.

Part of the plan is to decide who can best approach those on the list and how they should do so. Whenever possible, have the person with the most direct relationship—the “hottest” contact—reach out first. If that person cannot make the first contact, ask if the person who will make the contact can use her or his name. Decide if the best initial contact is by letter, e-mail, or phone, and choose how you will frame your purpose in that communication. Be direct that you would like to meet for forty-five minutes to an hour to let her or him know more about your organization and to explore her or his interest in supporting your work.

The goal of the initial contact is generally to get a meeting, which may be for cultivation or to ask for a gift,
depending on your situation. Keep in mind that sometimes you have to make multiple phone calls, send information, and deal with hesitation before you get a meeting. You may not ask for money until you’ve had one or two meetings, and you are likely to hold follow-up meetings after receiving a gift in order to sustain and increase the donor’s giving. It is also possible that you may discuss the donor’s contribution over the phone, though this is usually done face-to-face.

In a cultivation meeting you may be getting to know one another, or you may be inviting the donor to participate in a training or other event in order to deepen her or his connection. In any case, plan for who should attend the meeting. Should the organizer go alone or with a leader? Does the leader need to be a board member? Just as you would in other aspects of your organizing work, it helps to consider, case by case, the best team to approach the donor and the role each meeting participant can serve.

The following additional prep points may seem obvious, but they may be useful, especially for those just starting out. For any meeting with a major donor, even if you already have a friendly or cordial relationship, it is important to treat it as a business meeting and not be too casual in your dress or manner. Also, if you are meeting in a restaurant, be sure to have money in your pocket to pay for everyone’s meal. The prospective donor may reach for the check first, and that’s fine, but it is best to go into the meeting fully prepared in every way.

As with any good list, keeping track of donors with a database or other tracking mechanism is essential. You don’t necessarily need anything fancy. For each donor, note the following: The amount of the donation. The person who had the last contact with the donor. The nature of that contact. The donor’s interests. How and when the organization thanked the donor or sent an acknowledgment that the donor could use for tax purposes. Keep it simple, and make sure it is a format and a system that you and others in the organization can and will consistently use.

**PLAN THE “ASK.”** If the purpose of the donor meeting is to ask for a gift, plan out who will do this and how. It may be appropriate for a staff member to do the “ask,” or if a staff member and leader are together, the leader may do it. You can have any combination of organization representatives in the meeting, but generally, if you are seeking a major gift, the “ask” should come from someone in a leadership position. For example, it may come from the executive director.

**DIVERSIFY. CULTIVATE. STAY THE COURSE.**

It is critical to have a range of sources supporting your work: diverse individual and major donors in addition to private foundations, membership events, board giving, and other sources. The value of this is especially clear during times of economic uncertainty. If you are one of the top organizations a donor supports and is thoughtful about, she or he is especially likely to consistently prioritize you. Ongoing relationship building and communication are essential to gain continuous support. Major donors are just like anyone else who is truly connected with your work. They need to understand what your organization is doing and why, and they need to know that the organization values their connection.

In October 2008, during the sharp economic downturn, Bolder Giving in Extraordinary Times surveyed donors to assess how they expected to give in the year ahead. The 121 respondents were donors and members of family foundations, professional advisors, community foundation staff, and nonprofit staff who indicated their own individual giving decisions. Fifty-two percent of the respondents stated that they were committed to continuing their gifts at the same level, 21 percent said they would actually increase their giving, and only 17 percent expected to decrease their donations. “Watching people suffer now has strengthened my resolve to do whatever I can do,” said one respondent, a major donor who has used both his time and money in support of liberation education and youth organizing in Boston.

Donor cultivation can be part of a continual plan for developing organizational strength and power. You organize the donor community to invest in the organization just like you organize members to invest in the work of organizing. Organizers who are most effective at raising big money from donors make it part of every day’s work. In some cases, all organizers on staff spend a percentage of their time cultivating donors.

“When I first started out in this community, organizing as the single staff person, I spent fifty percent of my time organizing people, and the other fifty percent organizing money,” says one organizer who effectively works with major donors as part of an overall fundraising strategy. “I knew if I spent ninety percent of my time just organizing people, I’d pretty quickly have ninety percent of nothing.”
or lead campaign organizer, or from a campaign leader representing the membership or a board member. It can help to think in terms of who the donor would have the hardest time saying no to.

Plan what the person doing the “ask” will say, how much she or he will ask for, and how to handle various responses from the donor. For instance, if the donor says yes, how will you solidify the logistics of getting the check? If the donor says “That’s too much,” will you say “What would you be comfortable with?” or will you say “I know that’s a lot, but we ask it of you because it is so important to our work at this time. You are one of the only people we can turn to with a request like this.” If the donor says “No, I can’t really do that right now,” will you say “I understand, and I appreciate your taking the time to learn about us.” or will you say “Is it the amount or the timing that doesn’t work for you?”

In terms of the flow of an “ask” meeting, you can start out with some friendly chatting, but not so much that the meeting goes off course. You have already communicated with the donor by phone or correspondence about the purpose of the meeting. Restate this again to begin the meeting. Then use stories to illustrate the work of your organization and the role of the staff or leaders, and allow the donor plenty of time to describe her or his interests. If you or the other organization representatives make financial contributions to the organization, you can mention that as well. The first part of the meeting can take about forty-five minutes.

When you ask for the gift, do so clearly and without apology, usually by asking for a specific amount of money or suggesting a range and asking where the donor would be comfortable contributing in that range. You may ask the donor to give more than she or he has in the past or to make a multiyear gift. You may place the request in the context of a campaign in which you are asking several donors to pledge specific gift amounts. For example: “We have been asking all our donors who have given $1,000 to give $1,500. Can we count on you?” For another example: “In our spring fundraising campaign we are looking for five donors to give $10,000 this year. You have been giving $7,500. Can we count on you to be one of our lead people increasing to $10,000?”

Whatever the request, be sure to look the donor in the eye, stay upbeat and positive, state the request directly, then take a breath and wait. Give the donor a moment to think. Do not be tempted to fill the silence with more information, or with apologies or diversions. By the time you get to the point of asking for a gift, the donor has been expecting your request and will respond in a moment or two.

Once you have made the “ask” and gotten a response, then review the logistics of how to make out the check and how you will receive the payment, then say thank-you and end the meeting.

We include sample phrases and brief scenarios throughout this guide that illustrate donor meetings and the “ask.” Also see Appendix Two for a more detailed illustration of the cultivation and meeting process. In addition, in Appendix Three we cite two helpful articles you can find online: “Getting Major Gifts: The Basics,” by Kim Klein, and “The Major Gift Ask: A Step-by-Step Plan for Grassroots Groups,” by Andy Robinson.

Two useful books on donor meetings, which we also cite in Appendix Three, are The Ask: How to Ask Anyone for Any Amount for Any Purpose, by Laura Fredericks and Relationship Fundraising: A Donor-Based Approach to the Business of Raising Money, by Ken Burnett.

“I’ve learned so much by being close to people who are financially low in income but high in humanity. I come from five generations of wealthy white Anglo-Saxon Protestants. I’m relieved to move beyond my history and dedicate my resources to people doing great work in these times of challenge and possibility.”

—major donor
Linchpin Survey: Finding Two
Individual Donors Have Very Favorable Opinions of Community Organizing

Donors...

- **THINK ORGANIZING CAN HELP THEM ACHIEVE THEIR GOALS.** Ninety-two percent of the donors in our survey think that community organizing can play a critical role in achieving their philanthropic goals.

- **BELIEVE ORGANIZING BUILDS A LASTING FOUNDATION.** Ninety percent of donors agree that community organizing is about building a foundation of lasting relationships and trust that allows a community to mobilize on important issues.

- **ASSOCIATE COMMUNITY ORGANIZING WITH IMPORTANT POLITICAL ACTIVITIES.** Donors associate organizing with creating diverse coalitions, running public policy campaigns, and providing a voice in politics for disenfranchised communities.

- **SEE ORGANIZING IN SUPPORT OF COOPERATIVE SOLUTIONS.** Only 10 percent of donors feel that community organizing is too confrontational to address problems that require a cooperative solution.

- **AGREE THAT TECHNOLOGY DOES NOT REPLACE ORGANIZING.** Practically all donors surveyed agree that new technologies have not replaced community organizing. All but one donor disagreed with the statement “Technology and media have made traditional ‘face-to-face’ community organizing obsolete and unnecessary”—and nearly half of them strongly disagreed.

- **CONNECT ORGANIZING WITH HOPE.** Donors suggest that while organizing effectively taps into the anger in a community, the hope it accesses is equally compelling.

Implications for Organizers: Engaging Donors

When a donor has a positive view of community organizing, you can engage her or him by providing clear examples of what you do, illustrating the solutions and the hope your organization offers, and aligning them with what drives that particular donor’s giving.

**USE YOUR PEOPLE SKILLS.** Community organizing itself cultivates concrete skills that you can use to align your work with the interests of donors. See the description of a one-on-one meeting, an important tool, on page 7.

Asking open-ended questions and using strong active listening helps you to know what donors feel passionate about and what drives them in their lives and in their giving. What do you mean or potentially mean to the donor? If the donor already supports you, are you one in a long list of organizations she or he gives to, or are you a top priority? What would the donor like to do to support your work in other ways?

Repeating back to a donor what she or he has just said and relating her or his interests to the project or campaign for which you are fundraising is a communication tool that organizations already train staff and leaders to master in order to have effective one-on-one meetings and engage in other base building activities.
For example, a board member has introduced the organizer to a friend who is active in the church they attend and supports local social service causes:

Donor: I'm really concerned that more people are relying on the food pantry at church.

Organizer: Tell me more about why this concerns you.

Donor: I'm afraid this is not just a passing thing. I think these are the people who are losing their manufacturing jobs and stretching an unemployment check. They're not that skilled, and you can't live on a fast-food job.

Organizer: That's what our organization is finding too, and job loss is exactly the problem we are working to fix. For example, let me tell you about Pete. He was a maintenance supervisor, always worked, then suddenly the company laid off everyone. We're training Pete and the people who go to your church for food to develop and pass legislation in the city council to create jobs upgrading city buildings to make them more energy-efficient. And in the process of winning this legislation they are already learning new skills, like how to speak directly to their elected officials. Our organization is making it possible for Pete to go from the food pantry to being more active in the community and having a future in the new economy. Would you like to see more information about that work?

Because this is a person-to-person relationship, the donor may want to know more about the organizer who is participating in the conversation as well, in both early contact and as the relationship deepens. “Some donors want to connect to you, or really directly to the group,” one organizer says. “We are so well trained as organizers to hide behind a telephone pole, to stay out of the way. But I'm not so sure that's smart with donors.” It can help build the relationship to be ready to share your motivations, challenges, and hopes for the work you do. You can keep it simple and direct, especially in early contact: “I think everyone should be able to have a decent job.” or “I love helping new leaders find their voice.”

For leaders, going beyond their own personal experiences to share what they do with the organization and why, as well as their analysis of the policies that their work impacts, fosters full and real relationships as well as leadership skills. In addition to strengthening person-to-person connections, this helps donors to understand the role of leaders in community organizing.

EXPLAIN WHAT ORGANIZING IS. At least one skill of major donor fundraising is familiar to an organizer: being able to clearly and concisely offer people who are looking for connection an opportunity to do so. Donors achieve their goals by supporting organizations like yours—organizations that work, organizations that need and appreciate their support, and organizations that create the change they want to see in the world. It is extremely important to provide clear, concrete examples of what you do and why.

This does not mean that you oversimplify, but rather that you avoid jargon and broad terms and get down to what you actually do. In the book We Make Change: Organizers Talk about What They Do—and Why, Joe Szakos, executive director of the Virginia Organizing Project, and Kristin Layng Szakos, offer many concise examples of key phrases and straightforward language, in the words of organizers themselves. “In many ways I’m a teacher, not in a traditional classroom but in congregations and schools and neighborhood centers and union halls,” one organizer describes.

Providing details will help donors connect with you. Former community organizer Barack Obama’s 2008 presidential win raised the profile of community organizing but the public dialogue around Obama’s organizing experience did not exactly define what community organizing is. With major donors, you have the opportunity to offer definition to a concept that may not yet be in focus for them. Donors who are just beginning to understand organizing are often not comfortable asking what the language of organizing concretely means. Here is an example of how to illustrate the steps in executing a campaign:

Organizer: We are going door-to-door and talking to nearly every resident of the south and west neighborhoods. We are getting them to come out to hearings, meet with their elected representatives, and bring their friends out to show support for our transportation plan.

You can paint a picture to make your statements more compelling. The following is a description of a march:

Organizer: It was a rainy day, so all three hundred of us wore our neon red Pike's PLANT STINKS T-shirts under clear plastic bags. We made sure the march went along Route 12, close enough to Pike's open sewer, so the mayor could smell it.

The following are some additional sample areas, followed by brief example phrases, where being concrete will help donors to better understand your work:
COMMUNITY ORGANIZING. How do you describe what organizing is? In the book Tools for Radical Democracy: How to Organize for Power in Your Community, Joan Minieri and Paul Getso offer one definition: “Ordinary people participating in active community institutions, where they discuss politics and ideas as they work for a better neighborhood, city, state, nation, and beyond.” The following are some concise examples of how an organizer might describe to a major donor what organizing is:

Organizer One: We get people in the community to be more active.

Organizer Two: We give people a voice.

Organizer Three: We train people to change the system. We teach things like how to do community research and how to run a meeting with a public official.

Organizer Four: The best way I can explain community organizing is to tell you about one of the leaders of our organization, Alise, who when I first met her was worried about how she was going to stretch twenty-nine dollars in food stamps to feed her kids. Two years later she was representing people just like her, sitting on the advisory board for the state social services department, advising the people who run the food stamp program.

POWER ANALYSIS. What do you actually do when you develop a power analysis with members?

Organizer: We map out who has power in relationship to whom in our community, and how decisions get made. We examine where our organization fits on that map and what we need to do to have an impact on people with power.

LEADERSHIP DEVELOPMENT. What does leadership development look like in your organization, and what does it give the capacity to do?

Organizer One: We train community residents to get things done in their community.

Organizer Two: We help people help themselves.

Organizer Three: We help people create opportunities to make their own [schools, neighborhoods, workplaces] work for everyone.

Organizer Four: We train community leaders to speak out effectively on their own behalf. On a recent Saturday, fifteen of our most involved members spent all day learning and practicing their public-speaking skills. For instance, Dana had to drop out of college to take care of her ill mother. She was so quiet when we first met her at a city jobs fair, you could barely hear her talk at a meeting. But now she can take the mic at a council hearing and tell her elected officials exactly why we don’t need jobs fairs—we need jobs.

CLARIFY ORGANIZATIONAL ROLES. Briefly reviewing the terms your organization uses to describe roles and responsibilities can be very helpful for a donor, who may be used to a different set of terms and organizational structures. For instance, you may need to clarify for a donor why you refer to core members of your organization as “leaders.” This is one example of terminology that is widely accepted in community organizing but can be confusing at first for some donors. If you are the executive director and refer to your organization’s leaders, the donor may well be looking at you and thinking “Aren’t you the leader?” You can explain the board composition and the fiduciary responsibilities of board members, and how that may be different from the roles of other organizational leaders. Avoiding basic confusion allows you to get more deeply into the substance of your work more quickly.

INTRODUCE SOME ORGANIZING CONCEPTS GRADUALLY. As you build a relationship with a donor, some of your strategies, methods, and tactics will become more clear. For example, a major donor who is new to organizing is likely to come to understand agitation and how you use direct action as the donor understands the full range of your work. Once the donor sees how you include member development, research, policy analysis, and other approaches, a fuller picture of community organizing forms and makes more sense.

ENGAGE IN WAYS THAT DEVELOP CONVERSATION. In building a relationship, it is generally not helpful to approach major donors with agitation. Donors tend to value politeness. An agitational approach can feel impolite to a prospective donor and is likely to backfire. Instead bring your passion and spirit, and engage the donor in ways that develop further conversation.

PROVIDE SUCCESS STORIES. Success stories of how organizing brings the possibility of a better tomorrow convey the kind of hopeful spirit that not only keeps leaders involved, but motivates donors as well. You can invite them to feel not just your anger, but also
“Community organizing that leads to community engagement is a key factor in all the change work we need to do. It is one of the best places to make our issues real, to convert policy into practice, to give people the place and time to own the change, and to build understanding and trust for other people.”

—major donor

the hope that comes from collective action. On the other hand, stories that reflect on what you have learned from not meeting your goals can also be insightful and can bring donors inside your work.

Using examples from your own work or other efforts is key for illuminating the value of community organizing. You can demonstrate how people and communities have better lives because of successful organizing. Here is an illustration of one success story from current community organizing that several donors in our survey cited as being inspiring to them: the living wage movement (for more on the living wage movement, see page 26). This example briefly explains the purpose of the campaigns, provides numbers to show impact, and encompasses the broader implications of the success story:

Organizer: The living wage movement offers a current example of how community organizing makes a difference. With living wage agreements, companies with city contracts need to pay a wage above the minimum wage that more accurately reflects the cost of living. By winning over one hundred forty of these types of agreements city by city, through grassroots organizing and coalition building, community organizing has immediately put millions of dollars into the hands of working-class families who need and deserve it, helping them and their local economies. At the same time, the living wage movement has helped increase statewide minimum-wage laws, and it has fundamentally changed the idea that corporations can decide what’s fair, rather than abiding by a democratic process.”

LISTEN. Similar to one-on-one meetings, donor meetings are listening opportunities for organizers and leaders, where you learn about the donor, build on the potential connections with your organization, and bring the donor into feeling like your partner. For more on one-on-one meetings, please see page 7.

You can prepare for active listening by thinking about some open-ended questions that will provide space for the donor to speak about her or his own experiences and ideas. For example, if the donor says she or he wants to alleviate poverty, you can ask: “What do you mean by that? How are you thinking about poverty in our community in relationship to poverty in our country as a whole?” If the donor is interested in issues that impact new immigrants, for example, you can ask about her or his family and how immigration has shaped the donor’s personal experiences.

For the scenarios and sample phrases that we offer throughout this guide, we tend to focus on the organizer’s words. However, keep in mind that these samples are framed by the organizer’s or leader’s open questions and deep, active listening.

USE BRIDGE STATEMENTS. Donors need you to show them how your organization impacts the issue or constituency they care about. You can use statements that bridge what you do with what the donor cares about. The following are some examples.

SCENARIO ONE: The organizer is holding a second cultivation meeting with a donor who supports tutoring services, but does not yet support organizing. The organizer has planned to invite the donor to participate in an organizational event to see the work in action.

Donor: My wife and I feel good about helping to make sure the kids in the tenth district have decent tutoring services.

Organizer: A lot of our members use those tutoring services for their kids. The schools are pretty overcrowded.

Donor: They brought us to one school for a visit. The teachers were holding class in the hallways. I don’t see how kids can learn in hallways.

Organizer: Yes, that’s awful. That’s why we’re training the parents in district ten how to do something about
the overcrowding. We’ve talked to hundreds of parents from the district. They think if the schools were less crowded, the kids would get more of what they need during the school day. That’s why we’re training the parents to meet with the superintendent to come up with ways to reduce class size.

**Donor:** What do you train them to do?

**Organizer:** We teach them facts about how the schools work, as well as negotiation skills. For example, how the schools determine class size, what the superintendent’s role is, and how to negotiate our organization’s position. Would you like to sit in on one of our trainings?

**SCENARIO TWO:** The donor earned her or his own wealth and values self-sufficiency. In this cultivation meeting, she has been telling the organizer and a leader about being raised by her blue-collar grandparents.

**Donor:** So based on all that I had to do to get where I am now, I know it sounds corny, but I like when other people pull themselves up by their bootstraps.

**Organizer:** We’re corny too. We help people help themselves.

**Leader:** Just last week I was one of three of our most involved members who talked to the mayor’s staff about the need for our job training program. [The organizer] could have done the meeting, but now I know how to hold an important meeting at that level. The staff really responded to us, and as a result they are moving our plan forward.

**SCENARIO THREE:** In this cultivation meeting, the donor has been talking about his interest in “supporting families.” This comes from having seen his parents help build a school for disadvantaged children when he was a young boy, and recently becoming a father himself.

**Donor:** Family has always been the centerpiece for me. I learned from my own upbringing that family is the most important thing in life.

**Organizer:** Everything we work for supports the family. The increase in food stamps that we just won will help make sure parents can put food on the table. The child care credits we advocated for now let parents pick the providers that match their children’s needs, so they can go to work without worrying. The housing subsidies we won two years ago help small landlords to keep families in their home communities. Let me tell you about one of the families in our organization.

A major donor who is ready to sit down with you is looking for a connection. Major donors are looking for you the same way you are looking for them.
Linchpin Survey: Finding Three
Donors See the Short-Term Benefits of Community Organizing Activities, Though They Do Not Necessarily See How It All Adds Up

Donors...

• ASSOCIATE ORGANIZING WITH CONCRETE ACTIVITIES. Eighty-five percent of respondents to our survey said, for example, that community organizing is effective at increasing voter turnout. President Barack Obama’s 2008 election victory, with its emphasis on making personal contact and using online tools to move people to action, supported this perception. Donors tend to associate organizing with concrete activities like this, or with such roles as creating coalitions.

• QUESTION THE BROADER IMPACT OF ORGANIZING. While 50 percent of the respondents agreed that “community organizing is the most effective way to change institutional or community values over the long term,” nearly as many (41 percent) answered “neutral.” This is a significant deviation in this survey, as most respondents agreed or disagreed with most of the other statements we presented to them.

• WANT TO SEE ORGANIZING BUILD A MOVEMENT. Seventy-five percent of donors surveyed express concern that community organizing is not being used enough to build a popular base for the broader progressive movement.

Implications for Organizers: Cultivating Donors
As you deepen your engagement with donors and ask for their support, you can offer them opportunities to hear and see the broader implications of your day-to-day activities.

BRING THE DONOR INTO THINKING BIG WITH YOU. Many major donors think big, and they need to see how you are bringing this kind of thinking into your work. Some donors may want to engage in discussion about history and theory in relationship to your work. One organizer finds that many potential donors respond to an analysis about the decline of social capacity in the United States, leading to a clear description of how organizing is a response to this decline in civic participation and public life. “For a more progressive audience, I will dig into the rich history of social justice movements,” the organizer reports, noting that “a command of literature and history does not hurt” in these kinds of interactions.

The following example illustrates how to bridge three things in a big-thinking conversation: 1) the donor’s priority, 2) a key moment in history where organizing led to significant social change, and 3) your work:

Organizer: “What kind of world do you want for your children and grandchildren? By supporting our work to stop predatory lending, you can bring the same transformative power to economic justice as neighborhood organizations brought to the battle against redlining.

Another way of showing big-picture thinking comes from describing connections to other organizations, especially on a national scale. In a 2008 report on the impact of advocacy, organizing, and civic engagement for the National Committee for Responsive Philanthropy, Lisa Ranghelli notes that “evidence of an organization’s capacity is its connection to national expertise that adds value to the local work.” Highlighting your national connections concretely says that your organization thinks and acts in expansive ways.

ILLUSTRATE THE TIPPING POINT. When a donor believes in community organizing, you can talk about how your work is part of creating a “tipping point” or breakthrough on an issue. Here are some examples of how to phrase this to lead into an “ask”:
Organizer One: Our success in stopping contamination of our groundwater follows in the tradition of the cleanup of America’s skies and rivers—activating our local communities to stand up to polluters is the foundation for that kind of broader policy change. We hope you can help us train more local community members to be leaders in this campaign. We have so appreciated your gifts of $2,000 in each of the last two years. Would you be willing to pledge $5,000 to us over the next two years?

Organizer Two: Just as we now see increased support for a higher minimum wage so that no one who works has to live in poverty, our campaign to make health coverage mandatory for all children in our state is changing how policymakers view the needs of vulnerable children. To ensure that we can continue at this level of successful work, we started the Double Our Donors campaign. We are hoping that each of our donors will double their gift, and identify one other person we can ask to be a donor. We are hoping you will be one of the first ten who will do this. We know this is bold, but only because we are so excited about the campaign do we feel comfortable asking.

**DESCRIBE YOUR WORLDVIEW.** What are your broader goals and strategies, and how do your campaigns, leadership development, and day-to-day work move you closer to these goals? This core concern of many donors is one that organizing not only addresses, but does so in ways that offer unique opportunities to donors to strengthen fundamental principles of democracy and participation in the community and on the issues they care about.

You can weave in your own thinking with on-the-ground narratives. You can concretely demonstrate how your organizing involves your members and leaders in policy setting in the organization, on an issue, or in the community. The following is one way to describe how the day-to-day work of organizing moves an organization toward its ultimate goals.

Organizer: We believe in training low-income people, particularly women, to participate in the policy-making process. We think they can and should take on leadership in coalitions with other organizations, and win concrete policies that improve their own lives. Our core belief is that this will not only help us to build a strong organization that our members want to be a part of; we believe this will create a more fair and equitable community for everyone.

Donors want their dollars to lead to substantial social change. Organizing does that, and you can show them how.

“We found that when we were funding community organizing, we empowered a group of people, that whether they won or lost the issue, they’d continue to be a voice for change . . . [society] can’t step on them the same way anymore. So we knew that even if you lost the issue, you had changed lives.”

—family foundation member
ENGAGING DONORS IN WRITING HISTORY: LIVING WAGE CAMPAIGNS

The Story of a Movement. Several donors in our survey mentioned the movement for living wage jobs as an example of where they clearly see how community organizing delivers real outcomes and changes the social and political culture. The living wage movement demonstrates the unique ability of organizing to lift an issue above the radar and raise up the voices and experiences of ordinary workers. It fosters broad-based partnerships that can take on other economic justice issues and taps into sophisticated, big-picture strategies that organizations across the United States have honed, shared, and sustained over time. We provide this brief case example to illustrate a current movement-building success story and to show you how you can frame your own successful campaigns.

Over 140 Successful, Unique Campaigns. Beginning in the mid-1990s, “city-based campaigns were creating the foundation for a new social movement, and employer organizations were calling the living wage movement a serious threat,” Stephanie Luce, associate professor of labor studies, University of Massachusetts-Amherst, cites in her chapter in *The People Shall Rule: ACORN, Community Organizing, and the Struggle for Economic Justice* (Robert Fisher, ed.).

By 2007 there were 140 successful living wage campaigns in cities and counties around the country. “The ordinances were not the same everywhere, but most required employers holding service contracts with a city to pay their workers a wage close to the federal poverty line,” Luce reports. “A conservative estimate suggests that as of mid-2004, as much as three-quarters of a billion dollars was redistributed from firms, city governments, and consumers into the paychecks of low-wage workers, at an average of $3,000 per year per worker.”

Living wage campaigns offer organizers the opportunity to illustrate for donors how this kind of success could only emerge from community organizing. “No one model of campaign has dominated,” Luce suggests. “Instead, in every city the campaigns take their own form, shaped by a particular congruence of community organizations, unions, faith-based groups, students, and workers.”

In an October 2008 victory, for example, the San Jose City Council approved a living wage ordinance at the San Jose airport that it implemented on January 1, 2009. The city had adopted a living wage policy in 1998. Under the plan for the airport, workers earning as little as $8 an hour before the ordinance began to get $12.83 an hour with health benefits, or $14.08 hourly if no benefits were offered. This victory was the result of a community organizing effort including airport employees, a range of community leaders, and Working Partnerships USA—a coalition including labor, faith, and neighborhood organizations.

A Compelling Frame. The concept of a living wage has itself taken on a distinct and accessible meaning. “The genius of living wage campaigns has been to provide specific framings that highlight oft-hidden economic realities and fit progressive morality,” says linguist George Lakoff.

Organizations have successfully put a human face on the stark fact that workers who put in 40 hours per week still cannot afford health care or support their families because of their low wages, while their employers benefit from tax breaks and government contracts. For instance, during a successful St. Louis living wage campaign, the local Jobs with Justice organization conducted a Tour of Shame, publicizing area employers who were paying poverty-level wages while receiving tax support. *The New York Times Magazine* highlighted the living wage movement for a mainstream audience in a January 15, 2006, article, including photographs and profiles of workers whose lives were directly improved by a living wage victory in Santa Fe, New Mexico. Ramona Lovato, a janitor, reported that with her $2.00 per hour raise to $9.50, she planned to “Get caught up on everything. I’m behind on my mortgage, I’m behind on everything.” Louis Alvarez, a cook and hotel worker who saw his wages rise similarly, said simply that he would “buy a pair of shoes” and try to help his family.

From “Nowhere” to “Redefining the Wage Floor.” “It was nowhere on the agenda ten years ago,” Steve Kest, executive director of ACORN, told Stephanie Luce in a 2005 interview. “Now, everyone talks about it.” Kest notes that the living wage momentum has helped promote the “notion that the wage floor should be decided by democratic process rather than imposed by a privatized corporate process.” This flags a big-picture idea for donors, especially compelling for those who already like what they see in community organizing.
Linchpin Survey: Finding Four
Donors Are Motivated to Give by Outcomes They Can See, But They Believe It Is Difficult to Measure the Effects of Community Organizing

Donors...

• **WANT TO MAKE A DIFFERENCE.** A majority of respondents answered the open-ended question about what motivates them to give with some variation on the idea that they want to make the world a better place or make a difference in their communities.

• **LOOK FOR RESULTS.** They are more focused on the end result achieved than the process for achieving it. The examples of successful organizing that respondents cited were often “wins” such as living wage agreements. Additional examples include victories on expanding health-care coverage for children, and other policy changes.

• **BELIEVE THAT THE IMPACT OF ORGANIZING IS HARD TO MEASURE.** Forty-one percent agreed with the statement “It is very difficult to measure the impact of community organizing,” and nearly 21 percent replied “neutral,” meaning they did not strongly agree or disagree. This opinion undermines the ability of at least some donors to see what the activities they associate with organizing add up to.

• **WANT TO KNOW HOW ORGANIZING IS EFFECTIVE.** Donors don’t expect perfect measurement tools, but most do want to support organizations that are driven by results, with leaders that regularly assess and refine their efforts to achieve great impacts.

• **CONSIDER WHAT THE RETURN WILL BE FOR THEIR INVESTMENT.** Organizing is cost-effective, yet it often comes across to some donors as being expensive, since it can take a lot of time and effort to achieve concrete results.

Implications for Organizers: Deepening Donor Engagement

**DONORS WANT TO KNOW WHAT MEMBERS WANT TO KNOW:** Is this organization worth what I have available to me to invest? For most members it is about their time first and their money second. For most donors, it is about their money first, then their time.

**PROVIDE A MEASUREMENT.** Offering a clear measuring stick and being prepared to tell donors with confidence why it is relevant socially and politically as well as to their goals is often extremely important for drawing them in and moving them up the giving ladder.

Major donors are not all the same. Some need to see statistics, others gravitate to stories and individuals they can identify with. While donors are complex in their experiences, motivations, and preferences—they are all ultimately in it for the same thing: results and a connection to the values that are important to them.

In the following example, the organizer is holding a cultivation meeting with a donor whose giving is driven by a sense of fairness. In addition to offering a story that the organizer believes the donor will consider relevant to her or his goals, the organizer starts to define the concept of building power. In this example the organizer chooses the language of collective thinking to connect with the donor. As the donor becomes more knowledgeable about organizing, the organizer can introduce power building more directly, as one measurement:

*Organizer: We brought together twenty-five low-income women and taught them how—by thinking through their problems together—they could come up with real solutions.*

*Donor: People have to take responsibility for themselves, but they should have the chance to work for a better life.*
Organizer: Our members would agree with that. When we bring them together they can share their experiences with one another and learn about the social policies that affect them, rather than seeing themselves as isolated victims of challenging economic times. They see that when they act together, they can make changes that benefit not only themselves, but the entire community.

In the following example, an organizer and a leader are meeting with a donor who is used to funding big-number results in social service programs. They make the work of organizing as compelling as direct service while encompassing its broader goals:

Leader: Because we won the housing trust fund, three hundred families who would otherwise be in the shelter system found homes. My family is one of those families. My kids now have stability, and they are doing better in school.

Organizer: And five hundred additional units will be built over the next two years, ensuring that people like [the leader] can stay and raise their children here. Our housing trust fund victory has done a lot to resolve the immediate affordable housing shortage in this community.

You can point to the additional benefits that come from organizing. For instance, a decade of research on social capital, which is often built through organizing, demonstrates “overwhelmingly that when people are more connected to each other and to political and social institutions, all of society benefits,” Lisa Ranghelli notes in a 2008 report on the impact of advocacy, organizing, and civic engagement for the National Committee for Responsive Philanthropy. She maintains that the research shows these benefits manifest in positive outcomes for children, low crime rates, economic prosperity, improved physical and mental health, policy innovations, and a government that is more responsive to communities.

**SHOW THE VALUE OF ORGANIZING AND THE RETURN ON INVESTMENT.** You can place a dollar amount on the resources required to win specific policy changes and cost out both the redistribution of public resources and the impact on individuals and families. The living wage movement, as we describe on page 26, provides one example. Stephanie Luce estimates that as of mid-2004, as much as three-quarters of a billion dollars was redistributed to low-wage workers because of successful living wage campaigns, at an average of $3,000 per year per worker.

Lisa Ranghelli estimates the “return on investment” for the fourteen organizations in New Mexico she studied from 2003–2007. “For every dollar invested in the fourteen groups for advocacy and organizing ($16.6 million total) the groups garnered more than $157 in benefits for New Mexico communities.” She cites a total of $2.6 billion dollars in benefits to the groups’ constituencies and the broader public over a five-year period. The issue wins that Ranghelli documents include living wage and minimum wage increases, anti-predatory lending legislation, and affordable housing gains.

You can compare your costs to what it costs the opposition to stake its position. For example:

Organizer One: We do have a million-dollar budget, but keep in mind that Jack Smith spent 25 million dollars to win his Senate seat. The Waterfront Alliance spent five million in less than a year trying to convince taxpayers it cared about their kids playing ball on the waterfront when what they really wanted was to build condos.

Organizer Two: We will work hard with the money you have given us. Our organizers earn modest salaries, we have never purchased a piece of furniture—all our office has been donated.

**DESCRIBE THE COST OF NOT ORGANIZING.** If you can compare what your organizing achieves to the long-term negative impact and sheer expense of a community problem, the cost of organizing takes on a different meaning.

You can also put the time and money your approach requires in perspective, given the extent of the problem. In the following example, the organization is forcing an environmental cleanup:

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“I grew up in a family which prides itself on giving back to the community. I want to help to correct social, environmental, and economic injustices at home and abroad.”

—major donor
Organizer: It took fifty years to create this mess. It’s going to take fifteen years to win this campaign and see through the cleanup at that site.

Being concrete, specific, and proactive in communicating how and why you know your work is effective is essential for engaging major donors.

**DEFINING SUCCESS: A GROWING BODY OF TOOLS AND STRATEGIES**

**Addressing Questions of Impact “Right On.”** When former organizer David Beckwith became executive director of the Needmor Fund, a national family foundation that supports community organizing, “We took this right on,” he says of questions related to measuring impact. “We can prove that what we do makes a difference.” In 2003 the foundation had an evaluator create a series of measures for both process and outcome and apply them to twenty organizations broadly representative of Needmor’s grant-making over a ten-year period. The criteria included evaluating growth in individual membership, institutional membership, and the number of community-based leaders as well as assessing civic participation in two election years—all of which demonstrated significant impact. The Needmor evaluation also cited clear financial benefits. “We funded them $2.6 million and they achieved tangible results of $1.3 billion in benefits,” Beckwith reports.

**Showing Immediate and Long-Term Results.** The National Committee for Responsive Philanthropy report mentioned above includes measurements that organizers can apply to their own work to directly address questions of impact with major donors. For example, “Given that campaigns often can take years to complete, it is important . . . to articulate the milestones that have been achieved along the way,” says Lisa Ranghelli, the study’s author. She cites the efforts of Tewa Women United in coalition with other organizations to get the Los Alamos National Laboratory to “adhere to water standards and reduce community exposure to depleted uranium and other nuclear waste.” The immediate impact of this work was to win state enforcement of water standards and to educate residents about the health issues connected to these pollutants.

“Even though the lab generates so much money and jobs, it makes people sick,” says Kathy Sanchez, executive director of Tewa Women United. The next objective is to win a lawsuit to hold Los Alamos to the state rules. The long-term goal is to help Native communities develop other, more sustainable ways of earning income. “We would like to provide new and different business development education . . . [that] brings in income as an alternative to existing economic development,” Sanchez states.

**An Online Library of Tools and Strategies.** Another resource for finding sample evaluation tools and strategies that organizers can apply to their own work is the online library assembled by the Alliance for Justice. This project, known as RECO (Resources for Evaluating Community Organizing), includes case studies, tools and methodologies, and theoretical approaches to evaluation. Organizations can access these through free downloads, by e-mail request, or in books available for purchase. RECO includes summaries, direct links to materials, and other features to help community organizing groups readily access what is most useful for meeting their evaluation needs.

The Alliance invites organizations to submit their ideas for tools. It plans to continue to update RECO in order to keep the library timely and accurate. Resources currently listed include an assessment tool from the Chicago Community Organizing Capacity Building Initiative, a resource from Innovation Network that helps users to build a variety of evaluation tools for their programs and organizations, and a how-to chapter on campaign and action evaluation in *Tools for Radical Democracy: How to Organize for Power in Your Community.*
Linchpin Survey: Finding Five
Donors Want More Direct Contact with Community Organizers

Donors...

• **GET MORE FROM SITE VISITS AND BRIEFINGS.** Donors are more likely to give to organizations or programs they are personally familiar with. Fifty percent of surveyed donors reported they would prefer site visits, and 64 percent said they would like donor briefings with other donors in order to learn more about community organizing.

• **ARE NOT AS INFLUENCED BY INDIRECT CONTACT.** Very few donors selected such contact methods as Web sites and videos (27 percent and 19 percent, respectively). These are unlikely to be highly effective for engaging potential donors.

Implications for Organizers: Sustaining Relationships with Donors

**YOU ALREADY KNOW THE VALUE OF PERSONAL MEETINGS AND FACE-TO-FACE CONTACT.** Organizers will get more out of donor relationships by personally connecting with major donors as often as possible, depending on how often the donor wants to hear from you and the type of contact she or he prefers.

**PERSONALLY CONNECT.** Although it takes more time and effort, organizers can invite donors on site visits, showcasing the human impact of organizing in action. Actions, leadership training sessions, and tours of the communities you organize all allow donors to meet members directly.

You can bring leaders to meet with donors and share from their own hearts why they value the organization. As you meet with donors over time, the meetings you hold will grow and develop, offering a training ground for others in the organization to learn how to meet with major donors. Personal connections not only cultivate major gifts, they more effectively sustain real relationships.

When donors meet members and see your work in action, it helps them to make emotional connections and raises up the hopefulness of what you do. While the Internet has expanded the reach of fundraising appeals, our survey indicates that face-to-face is still the way to go. Technology-driven campaigns are less effective for moving donors.

**THANK AND INFORM DONORS REGULARLY.** When any donor gives money, be sure to send a written thank-you within as close to twenty-four hours as you can, and for a major donor, make a phone call. If the donor has supported something specific, such as a member’s participation at a national event, a thank-you note from that member makes the connection even stronger. If the gift has particular significance, such as putting your fundraising campaign over the top, call and let the donor know that.

Effective stewardship of donor relationships is ongoing and is similar to what you already do to sustain an active membership in your organization. For instance, conducting a phone bank where members or board members call donors to update them is great for building donor relationships and is a way to identify which donors you can move up the giving ladder. Depending on each donor’s contact preferences, sending newsletter updates (hard copies tend to be more effective than e-mail versions), inviting donors regularly to public events, having coffee together to get their input, and strategically asking donors to do more, such as participating on committees, are all ways to build personal, sustained connections. In addition, it can be appropriate at times to do things such as go to a talk that a major donor is giving or attend an event held in her or his honor.

**ACTIVATE DONORS.** Getting donors to do things with your organization is another way to foster deep connections. These invitations depend on donor interests and preferences. For donors who want to be more active, you can ask them to do everything from phone banking and attending public actions to holding house parties for other potential donors to chairing a fundraising committee or serving on the board.
CONNECTING DONORS DIRECTLY WITH ORGANIZING: FROM TOXIC TOURS TO “A DAY IN THE LIFE”

Opportunities to Show Your Story. You can use the activities that you regularly engage in as opportunities for connecting donors with your work. You cultivate their knowledge of what you do as well as build relationships. What works for a good site visit with a program officer is also effective with a major donor.

For instance, Iowa Citizens for Community Improvement (Iowa CCI) organizes on a variety of social and economic justice issues, including housing, immigration, and campaign finance reform. One area of focus is to support family-owned and -operated farms and to oppose factory farms. Hugh Espey, executive director, describes to the local press the environmental impact of a factory farm: “The hogs stand on flats and their feces and urine—what doesn’t cling to the slats—drop into concrete pits below the building. When the pits are pumped out, there are millions and millions of gallons of manure that are spread on the ground, and from there some of it drains into streams and gets into the groundwater.” The manure smells horrible and affects the health of local residents. When donors see the source of these ills firsthand, they see what their money is helping to fix.

An Iowa CCI leader who operates a family farm near a factory hog farm puts this in perspective: “We want to preserve the peace and calm, the laundry hanging on the line,” he said while addressing a public rally, “but now there are close to 40,000 hogs in confinement units within a five-mile radius. . . . The smell doesn’t confine itself to the legally required separation distance.”

“NonToxic” as Well as Toxic Tours. The organization paints a clear picture of the factory farm, yet in at least one case, brought funders to the more hopeful family farm alternative that it supports. “The most significant impression,” according to one participant, “. . . was what there was not: no foul and acrid smell, no sludge pond, no acres of farmland inundated with manure, no pigs in confinement. The three-week old piglets looked healthy and frisky . . . they had a farmer to talk to them and rub their necks—and [Iowa] CCI to help keep them and their owners from being swept away.”

Similarly, environmental justice organizations have long used toxic tours to engage funders and allies as well as those targeted by their campaigns. Many have seen how taking people directly to see the operations of corporate polluters and experience how its impacts local communities builds a powerful understanding of what is at stake.

What We Live and How We Do Our Work. In economic justice campaigns, organizations have successfully used “Day in the Life” actions, such as taking a public official on a tour of a public housing project or having her or him spend a day experiencing what a mother receiving welfare benefits for her family must do just to survive.

“We find that we have no chance at all to get some donors (major or otherwise) to support us unless we create multiple opportunities for them to ‘see’ us,” says Jane Beckett, vice president of Progress Center for Independent Living, which organizes to change public policies and also creates self-help programs. “That can be as simple as showing them pictures of our turnout of one hundred seventy people at the Disability Pride Parade or inviting them to an open house to meet our members and staff, or making sure that we’re visible in the community at every opportunity.” Beckett notes that this not only makes her organization’s work real to donors and potential donors, but it helps establish connection with people who are not able to give money but may be able to help the organization in other ways.

Seeing the problems of a community and its solutions through real, concrete experiences draws all supporters of your organizing, including major donors, into partnership and commitment with your organization.
“Meeting the people in community organizations who are speaking up for themselves. It is incredibly energizing. You feel ‘I’ve met somebody who is a powerful person.’ They may not be Martin Luther King, but there’s a small way in which they are.”

—family foundation member
Dear Reader,

You don’t know it, but you are my hero, heroine, goddess, warrior, champion.

Why? Because I believe that fundraisers—and in particular, those who are willing to ask people for big bucks—are the unsung heroes of social justice organizing and movement building.

Think about it. Not only do you have to know chapter and verse about your organization, but you have to be radiant and positive when answering probing and repetitive questions, have a variety of inspiring stories to tell that demonstrate your group’s effectiveness to resonate with donors’ hearts and values, and clearly and directly ask for the donation in a bold, upbeat, unflinching manner (keep breathing), and once you get the gift, you leave the donor NOT resting on your laurels but following through by thanking them in writing, staying in touch, and finding other donors. Wow. You are awesome.

YOU ARE AMAZING!

But guess what??? IT WORKS!

When new donors are polled about why they haven’t given to a particular group before, they usually say, “Because no one ever asked me.” It’s that simple. Whether you are an organizer, leader, board member, or current donor . . .

NOW IS THE TIME TO ASK.

This guide emphasizes that some of the same skills and techniques that are effective for engaging community members in your organizing efforts apply to building relationships with major donors. Many of these donors could already be in your network of friends, associates, former classmates, or business contacts—or in the networks of others in your organization.

Many are looking for ways to contribute financially to organizations that they understand, that inspire them, that are effective and engaging.

THEY ARE LOOKING FOR YOU.

If you make personal contact and reach out to those who have the capacity to give, those who are already connected in some way either because they know about your work or they admire one of your members, or because they care about the issues you address or the people you are organizing—my conversations with progressive donors suggest that they can and will give you money.

Don’t let your fear hold you back—fear of a tough economy, of asking for money, of a repeat of a past fundraising frustration.

This is a great time to be fundraising for social justice.

There is so much heightened awareness about community organizing and civic participation right now, and whether economic conditions are up or down, people with wealth have money and they continue to give. Untapped resources for community organizing lie with individuals—individuals who want to give and who are looking for opportunities where their dollars can make a real difference.

I hope this guide proves useful and helps you raise big money. I welcome your comments and your stories as you build your major donor fundraising in support of community organizing.

Oh, and one more thing—I want to hear your stories about how really great it feels when you meet with prospective donors, talk with them about your group, ask for money, and they say yes! Talk about a natural high. . . .

The times demand us to be bold visionaries and participants in the struggle for social justice. We can make it happen.

Go forth and fundraise.

With immense respect, gratitude, and faith,

Margie
APPENDIX ONE

A Note About the Donors Who Were Formally Surveyed

The Linchpin Campaign conducted a survey online of mostly moderate to progressive donors from January 9 to March 16, 2007. The survey was designed and administered by Spitfire Strategies. We collected data from 189 major donors, and of those respondents, 108 answered all the questions; a 10 percent return that the survey team considered significant. We contacted most of the respondents (all private donors) through one of several organizations that helped promote the survey, including the Center for Community Change, The Women Donors Network, North Star Fund, Funding Exchange, Astraea Lesbian Foundation for Justice, the Ms. Foundation for Women, Jewish Funds for Justice, and the Environmental Grantmakers Association. More than twenty organizations agreed to send a total of over 1,000 surveys to their members.

Respondents came from all over the country, with the heaviest concentration in the Northeast (28 percent), Midwest (26 percent), and West (24 percent). Sixty-one percent of respondents were female, and 38 percent were male. Respondents’ ages ranged from under thirty to over sixty, but the largest percentage was in midlife—48 percent of those surveyed were between the ages of forty-five and sixty, and 26 percent were over sixty. Respondents also gave at a variety of levels. Twenty-three percent gave $10,000 to $25,000 per year; 21 percent gave $25,000 to $100,000 per year; 21 percent gave between $100,000 and $500,000 per year; 12 percent gave between $500,000 and $1 million annually; and 22 percent gave more than $1 million per year.

APPENDIX TWO

Engaging and Cultivating a Major Donor

The following is an example of how to build a successful relationship with a donor. The example follows three recommended steps for securing a major gift, a familiar series of steps for organizers who regularly move people to action. Keep in mind that while we use the example of an executive director representing the organization, it could just as well be a staff organizer, a leader, or a team of people:

1) Prep with a letter. 2) Follow up a phone call. 3) Sit down for a visit.

After following these steps, thank the donor and continue to cultivate the relationship, to turn a one-time gift into a major donor relationship.

SCENARIO. The donor, Jenny Jenkins, cares deeply about health care. She chairs a local event every year to raise money for the local children’s hospital. She also supports Democratic political candidates who speak out about the need for health coverage.

The organizer, Amanda Adams, is the new executive director of Health Care Now, a locally based organization that is fighting for universal health insurance.

Jenny Jenkins went to the same college as Health Care Now’s founding director, Bob Boxer, and sent a check for $200 last year at his request.

Letter

Amanda recently sent Jenny a letter by mail and asked for a meeting. In the letter she did four key things: 1) thanked Jenny for her earlier gift (mentioning the connection to Bob Boxer); 2) updated her on the organization’s accomplishments; 3) flagged some goals for the year ahead; and 4) told Jenny that she would call soon to set up an appointment to talk about increasing her gift this year.

Phone Call

Organizer (Amanda): Hi Ms. Jenkins, this is Amanda Adams calling from Health Care Now. I’m following up on the letter I sent last week.

Donor (Jenny): Oh yes, that group Bob Boxer runs.

Organizer (Amanda): That’s right. Bob founded our organization and has recently moved on to work for a national organization that works on the same things we do here locally. I worked closely with Bob and am now the director here.

Donor (Jenny): Oh, ok.


Donor (Jenny): Jenny.

Organizer (Amanda): Thanks, Jenny. I really appreciate the donation you made to our work last year. I’d like to schedule a time to meet, to talk more about what we do at Health Care Now.

Donor (Jenny): Sure, that would be fine.

Amanda sets up the logistics and clarifies whether she will be alone or have someone with her. In this scenario, she will attend the meeting by herself.
First Visit (Cultivation Meeting)

Organizer (Amanda): Jenny, you gave us a gift of $200 last year, which we greatly appreciated. Why did you do that? What is it about our work that interests you?

Donor (Jenny): Bob is a great guy, so when he asked, I was happy to support him.

Organizer (Amanda): Bob is still a great colleague of ours. He’s told me you are interested in improving health care, which is what we focus on. Can you tell me more about what you think about that issue?

Jenny describes her fundraising efforts for the local hospital.

Organizer (Amanda): It sounds like you’ve been very successful. Why do you put so much time into that effort?

Donor (Jenny): The hospital does excellent work on a small budget. We have a strong committee, so it’s really not that much time for me. I enjoy doing it. What exactly does your group do to promote health care?

Organizer (Amanda): We believe that everyone should have good, quality health insurance.

Donor (Jenny): It seems to me, the least we can do in our country is make sure that kids can go to the doctor when they’re sick. We should have some kind of universal health coverage. I’m glad to hear politicians talking about that.

Organizer (Amanda): I agree on both counts. It’s just wrong that sick people can’t go to the doctor because they don’t have the money. That’s why I do this work. Health Care Now is getting more people to be active in the community so that they can get our public officials to support, on a policy level, the goal of health insurance for everyone.

Donor (Jenny): What do you mean? How do you do that?

Organizer (Amanda): Well, here’s an example.

Amanda provides an example of someone an organizer met doing outreach at a health clinic who has serious health care problems, got trained by the organization, recently spoke out to a public official, and later got the official to support the organization’s platform.

Why is it that you are so committed to helping children, in particular?

Donor (Jenny): I raised four children and it is the most important thing I’ve done in my life. My children were healthy, thank goodness, but one of them had a best friend whose entire family suffered to get her the care she needed for a chronic illness. They had no insurance and it was just awful. It’s something I can do something about.

Organizer (Amanda): It’s clear that keeping kids healthy and making sure the system works are important to you. I would love to have your support for our organization. I think concerned parents like you, Jenny, can bring the same transformative power to health care as Mothers Against Drunk Driving brought to highway safety.

Amanda can either ask for money now or deepen the relationship and ask for a more significant gift later. In this scenario, Amanda’s founding director, Bob, who knows Jenny, has said that Jenny’s family has a long history of significant giving. Amanda planned this as a cultivation meeting. She wants to invite Jenny to do something to get more connected to the members. In a meeting like this, Amanda could just listen and share information about the organization. Or she could ask Jenny to work with a committee, get her donor’s opinion on issues, or offer to bring her on a fact-finding mission.

First Jenny responds to the general request for support.

Donor (Jenny): Well, I have a number of groups I’m committed to.

Organizer (Amanda): Yes, I’m sure you’re being asked to help many groups at this time. I hope you find a way to do that. Some members of our organization are meeting next week. If you could join us, they can tell you more about why they are involved.
Jenny agrees to attend. Amanda calls to follow up and Jenny attends the meeting. She hears powerful stories from members. Amanda learns even more about Jenny from Bob, the founding director, and from researching where else Jenny gives and at what levels. Amanda decides to ask Jenny for $5,000. She contacts Jenny and asks if they can meet to discuss Jenny’s support for Health Care Now. Jenny agrees. Amanda practices doing the “ask” with a coworker, and when she meets Jenny for coffee, she is fully prepared.

Second Visit (The “Ask” Meeting)
For about thirty minutes, Jenny talks about the meeting she attended.

Organizer (Amanda): Jenny, I was so glad you could come and meet with the members of our organization who are fighting for health care for themselves and our community.

Donor (Jenny): They are really an amazing group of people. I’m glad I went to the meeting.

Organizer (Amanda): They are. And they need your help. I need your help to keep bringing in new people and to win the legislation we are fighting for. Would you consider making a gift of five thousand dollars this year?

Amanda asks for the gift in a clear, unapologetic way, then does not say anything more. She waits. It may seem to take forever, but the donor will respond!

Donor (Jenny): I really like what you do, but that’s a lot.

Organizer (Amanda): Yes, only the importance of the campaign makes me bold enough to ask you.

Amanda takes a breath. Waits!

Donor (Jenny): I could do that for you over two years.

Organizer (Amanda): That’s fantastic, Jenny. Thank you very much.

As you become more experienced in these kinds of meetings, you start to learn more about what to say, when to say it, where to push, where not to push. For example, Amanda could keep trying to get the $5,000 gift this year. She could say, for instance, “I appreciate the two years, but we really need it, and this is how we will use it.” Instead, she decides to close the meeting and will continue to cultivate the relationship.

Amanda does the following to secure the pledge and build the relationship:

• Amanda goes over the logistics of how Jenny can make a multiyear pledge.

• The next morning, a member Jenny met at the meeting calls to thank her. (Some donors want to be anonymous and some want to be known, so Amanda asked Jenny which she preferred.)

• The next morning, Amanda writes Jenny a personalized thank-you letter and sends it via postal mail. This letter includes a personal word of gratitude from Amanda and a brief, handwritten thank-you note. It also serves to formally acknowledge the gift and includes tax-deduction information.

• When the organization receives the check, Amanda sends a handwritten thank-you card to Jenny.

• Amanda sends Jenny periodic e-mail updates to let her know what’s happening in the organization.

• Six months later, when members hold a phone bank to thank donors, Jenny gets another call and an offer to receive the organization’s new report on health care.

• After a year, Amanda meets with Jenny again and asks her if she would be willing to sign a letter to some of her friends asking for support for Health Care Now. She agrees. The letter raises $2,000 and leads to two new major donor relationships.

Over time, with this kind of ongoing cultivation, the relationship between Jenny and Health Care Now deepens. Just as she hosts a successful fundraiser for the hospital each year, she prioritizes her annual gift to Health Care Now and increases it annually. Jenny continues to be a reliable donor and a source of contacts and support.
APPENDIX THREE

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The following is a list of the resources and individuals we directly referenced or used in our research for this guide:

ACORN (www.acorn.org).


Bolder Giving in Extraordinary Times (www.boldergiving.org). Bolder Giving donor survey: [available at boldergiving.org].


Community Voices Heard (www.cvhaction.org).


Gamaliel Foundation (www.gamaliel.org).


Grassroots Fundraising Journal, GIFT (Grassroots Institute for Fundraising Training) (www.grassrootsfundraising.org).

Iowa Citizens for Community Improvement (www.iowacci.org).

Jobs with Justice/St. Louis area (www.stl-jwj.org).

Klein and Roth Consulting. Kim Klein and Stephanie Roth (www.kleinandroth.com).


Needmor: 50 Years, 50 Stories. Published by the Needmor Fund.

Progress Center for Independent Living (www.progresscil.org).

UnTapped: The Linchpin Campaign—A Project of the Center for Community Change


Spitfire Strategies (www.spitfirestrategies.com).


Tewa Women United (www.tewawomenunited.org).


Virginia Organizing Project (www.virginia-organizing.org).


Working Partnerships USA (www.wpusa.org).