

REPORT ON THE 17TH ANNUAL GRASSROOTS GRANTEE CONVENING
of the California Environmental Grassroots Fund
California Wildlands Grassroots Fund
Grassroots Leadership Fund



A 4 Part Virtual Series
Held via Zoom

Friday's October 14- November 4, 2022

2022 Virtual Convening Theme: Donor Fundraising for Grassroots Groups!

The annual Convening of California Wildlands Grassroots Fund and California Environmental Grassroots Fund grantees remained virtual in 2022, which allowed us to include grantees from our Grassroots Leadership Fund and other Rose Foundation grants programs and partner organizations across the country. Altogether, 82 attendees (74 of whom were grantees) participated in 4 free 2-hour online training workshops exploring individual donor fundraising strategies for grassroots organizations. Workshops were held every Friday from October 14- November 4, 2022.

The series focused on core strategies for small grassroots organizations to build their donor fundraising capacity. Training sessions explored how to create an annual fundraising plan, how to build one's outreach list, how to implement email and direct mail appeals for donations, how to use events to build your donor base, and most importantly, how to recruit and train volunteers to help accomplish this work. The four webinars were organized around the following topics:

- 1. Crafting an Effective Grassroots Fundraising Plan** - *Participants learned how to set realistic fundraising goals and create a yearly fundraising plan for an organization led by volunteers.*
- 2. Donor Cultivation & Fundraising with Volunteers** - *Explored ways to organize, train and support volunteers that are leading grassroots fundraising efforts as well as how to cultivate and identify donors when you have limited organizational capacity*
- 3. Making the Ask, Fundraising with Boards, and Planning Great Events** - *Participants practiced making an ask to donors, explored ways to build out their fundraising boards, and how to use events to gather support for their work.*
- 4. Structuring and Strengthening Community Appeal Campaigns** - *Explored different types of community appeals for donations and potential avenues to raise funds from community members.*

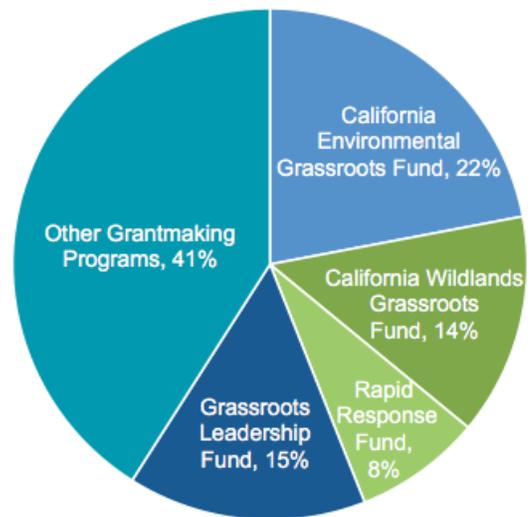
We partnered with [Nonprofit Learning Lab](#) to lead the 4 webinar training sessions. Please see below for more information about their work and instructors.

Highlights

Altogether, 82 attendees (74 of whom were grantees) participated in the 4 virtual workshops. This is equivalent to the in-person attendance of our last several convenings.

On average we had about 29 grantee attendees per session. Of the grantee attendees, 22% were grantees of our California Environmental Grassroots Fund, 14% were California Wildlands Grassroot Fund grantees, 15% were from our Grassroots Leadership Fund, and another 49% were from other Rose Foundation grantmaking programs (mostly grassroots grantees from our watershed funds and Rapid Response Fund (8%)). This is a higher than average attendance from grantees of our other grantmaking funds, though the total number of grassroots grantees didn't change significantly from years past. It's possible that this year's topic of individual donor fundraising was more appealing to these groups, who tend to be larger and more established and thus more capable of intensive fundraising. But we were also very open with our invitations this year, and our broader outreach may have simply attracted more attention than earlier convenings.

2022 Grassroots Grantee Convening Attendees by Fund



The topics and presentations themselves seem to have attracted greater interest than last year, as we saw a larger number of participants at individual sessions than with our first two online convenings in 2020 and 2021. Of the grantee attendees, 35% attended 2 or more sessions. Additionally, we had another 41 grantees who signed up for the webinars, but did not attend a session. These large registrant numbers indicate interest from people who may end up engaging with the recorded workshops and other resources, though they did not attend at the time of the event.

Benefits of a Virtual Convening

Although we miss the connectivity of in-person events, the online format provides flexibility for our grantees to plug into the trainings where and when desired and greatly expands the geographical reach of the event, removing travel barriers and allowing grassroots grantees

from across California, and the country, to participate in the workshops together. We had grantees from New York and New Orleans conversing with groups from Washington state and activists from every corner of California. It was inspiring to see their common struggles reflected in the conversation, despite their geographic and issue area diversity.

An additional benefit of the virtual format is that all session recordings are available on our website for grantees to return to and explore at their convenience. We hope this will provide a valuable tool for future grantees, and allow us to expand our store of available capacity building resources to share with all our grassroots grantees.

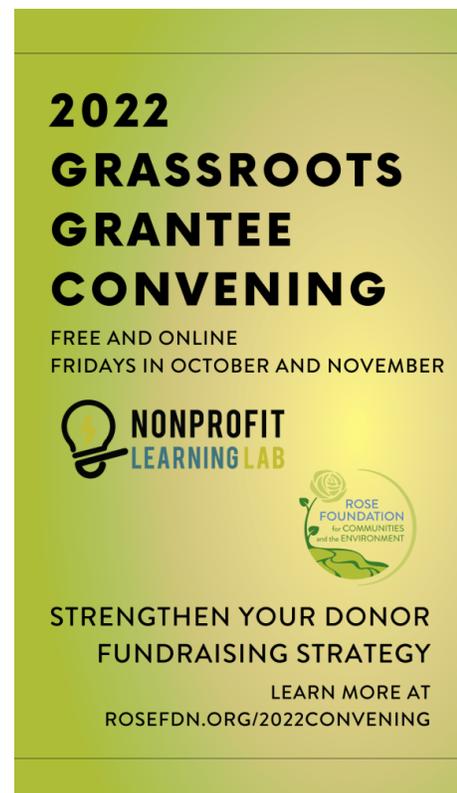
The webinar recordings, slides, and additional resources can be found on our [Resources and Recordings page](https://rosefdn.org/2022conveningrecordings): <https://rosefdn.org/2022conveningrecordings>

Spanish Language Accessibility

For many years, the Rose Foundation has offered simultaneous Spanish translation during the Convening to make the event accessible to grassroots groups led by Spanish-speaking community members. This year, our webpage about the event, email outreach and registration for the Convening were offered in both English and Spanish. Every session had simultaneous Spanish interpretation with workshop materials in both English and Spanish. Our interpreters did an excellent job incorporating spanish interpretation into the flow of the training and directly engaging spanish speaking participants during the workshops. Though not as robust as participation in previous years, we were pleased to see 5 registrants and at least 2- 4 people per session who utilized the simultaneous translation.

Evaluation

Attendees were asked to complete a short evaluation survey at the end of each session. In total, over the 4 sessions, we received 23 completed evaluations with an average response rate of about 31%. This is much lower than our response rate at in-person convenings, and even last year's virtual convening. This seems to be par for the course with online training and was exacerbated by the fact that a couple of the sessions went long and there wasn't sufficient time allotted to the survey.



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FREE AND ONLINE
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Unfortunately with only a 9% -38% response rate for a given session, it's hard to make meaningful statements about how participants received the training sessions. From the little data we have, 90% of respondents somewhat or strongly agreed that the session topics were relevant to their work and would recommend the training to others. 86% agreed that they would use what they learned in the workshop in their own work. However, we did get a lot of positive qualitative feedback, including accounts of a grantee who used what they learned at the convening to launch an end of year campaign. Selected written feedback is included below:

Selected Quotes from Grantee Participants:

The sessions were so informative and supportive, I look forward to listening to ones I missed and all 4 segments with our advisory board and future volunteers.

Corinne Haskins, Moving South Berkeley Forward

Leah was such an expert presenter and made the material accessible and relevant to all our various nonprofits. It felt like a one on one private fundraising consultation, maybe because I was asking lots of questions. But she responded so quickly and with great tips! I liked the break out rooms, just to realize that I am not alone was a huge value.

Oona Heacock, Conservation Works

I appreciate having time to ask the facilitator specific questions I might have, as well as get tips from other organizations of what has worked well for them.

Amanda, Ascend Wilderness Experience

From Anonymous Feedback:

The sessions were really organized and thoughtfully presented to be relevant to truly small/capacity limited/rural orgs who are nonetheless ambitious, but risk getting overwhelmed.

It is so empowering to be able to directly implement the obvious things like a fundraising plan and Giving Tuesday campaign immediately. But it is also great to brainstorm less obvious things like corporate sponsors, invigorating the board, peer-peer fundraising options too.

Reflections

[Nonprofit Learning Lab](#) did a fantastic job making the subject matter relevant for small groups with very limited capacity, including offering lots of advice and information about

volunteer recruitment and training to support fundraising efforts. They presented an impressive amount of information in the limited time of each session, and were engaged and insightful in answering individual participant questions. We've found group discussion with the trainer addressing attendee's specific questions and challenges to be a highly effective way of communicating relevant information and creating an engaging virtual space. It often creates room for good discussion with other attendees, an opportunity to share advice and

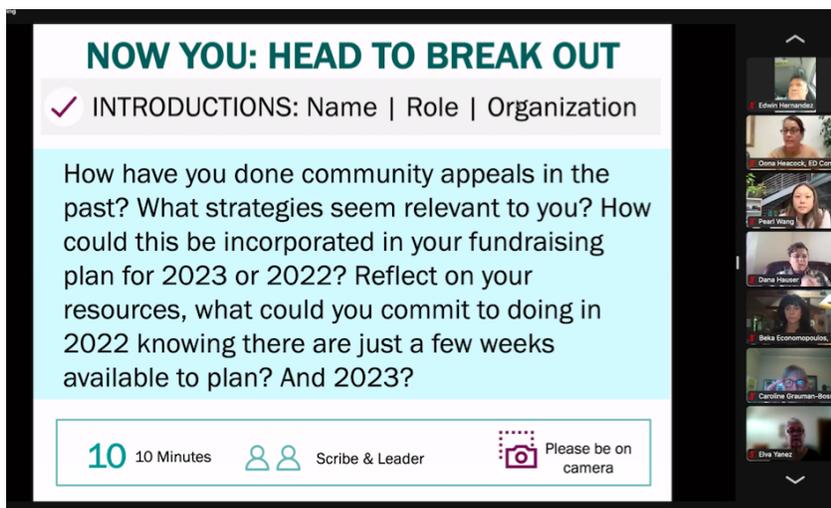
experience among peers, and personalized examples of how to apply the information from the training that is valuable to all.

We've had mixed experiences with breakout rooms over the last few years of virtual convenings. Some people love them, some people can't stand them, and

often a good experience depends on who else is in the room and if there's a skillful facilitator to move the conversation along. Unfortunately, despite our best efforts to curate the rooms, not knowing who would attend a given session made that difficult. Ultimately, we haven't been able to replicate the organic networking and engagement of an in-person event, though the virtual format does work well for communicating subject matter and for limited connection building. Even so, we are happy to report that the 2022 Convening was a success. Compared to the last 2 virtual convenings, we had a larger number of grantee attendees overall; the topics and discussion proved interesting and relevant to folks; and we received a lot of requests to offer additional training opportunities.

Future Convening Topics

Board Development topped the list of requested future training topics, with Grant Writing and Accounting/Budgeting tying for second place, and Communications and Storytelling coming in closely after that. These responses are consistent with feedback we have received from grantees in report forms and individual conversations. We look forward to continuing to explore online and in-person opportunities for networking and training with our grassroots grantees in the coming year.



Grantee participants in Session 4
Structuring and Strengthening Community Appeal Campaigns

Meet the Trainer



Leah Weiner is the Founder and CEO of the Nonprofit Learning Lab, a national nonprofit that connects and trains leaders in the nonprofit sector. She has a passion for ensuring that individuals working in the nonprofit sector are armed with best practices, strategies, and a community of peers. Leah's approach to training focuses on making sure that information helps participants solve a problem or create a solution related to their professional work.

Leah has worked as a Senior Gift Planning Officer at Cedars-Sinai Medical Center where she cultivated major gift donors, supported the hospital's legacy society and supported the stewardship of donors contributing to the hospital capital campaign. She also served as an education committee member of the Planned Giving Roundtable of Southern California assisting with coordinating educational workshops and networking opportunities for professionals who focused on planned giving in Southern California. Leah has a masters degree in public administration from California State University Northridge. Leah received a doctorate in organizational leadership and development from Pepperdine University. Her doctoral dissertation was titled "In search of best practices: a case study of a volunteer-led nonprofit organizations to deliver aid in crisis." She previously taught in the nonprofit masters program at the Notre Dame Mendoza School of Business.