Grassroots Fundraising Journal

VOLUME 34 NUMBER 2 • MARCH–APRIL 2015

A PUBLICATION OF
GIFT
Grassroots Institute for Fundraising Training

10 Years, 10 Days, $10K

Triumphs & Trainwrecks in Major Gifts Fundraising

Write Stronger & Smarter Proposals

Build an Awesome Board

Contents

Volume 34 | Number 2 • March–April 2015

FEATURE

On Our Cover

Our cover image is a collage of Young Nonprofit Professional Network (YNPN) staff as budding YNPN leaders. Pictured from the upper left hand corner clockwise: Data Systems Director Elana Needle; National Director Trish Tchume; Communications Coordinator Autumn Hubbard; Development Coordinator Kiara Boone; Program Innovations Coordinator Kira Luna; Chapter Support Coordinator Hafizah Omar; National Conference Coordinator Al Heartley; and Communications & Network Engagement Director Jamie Smith. Autumn Hubbard created the graphic, which was shared with YNPN supporters in December 2014 to highlight the success of their 10th anniversary campaign.

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

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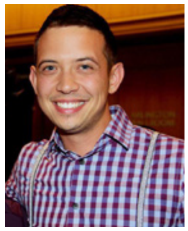
Periodicals postage at Oakland, CA 94615 023-243.

Postmaster: Please send address changes to
1904 Franklin Street, Suite 705
Oakland, CA 94612



Taking Care of Ourselves & One Another

HAPPY LUNAR NEW YEAR AND YEAR OF THE GOAT! As we welcome this new year in, I'm setting intentions for more balance, authenticity and wholeness in all that I do.

As fundraiser organizers, we're used to being on the grind all the time, leaving little time for cooking, eating well, or exercising, let alone resting. The needs and current struggles facing our communities and social movements are dire and urgent, often making it hard for us to take breaks. As I start this new year, I am thinking a lot about how we can find a better balance between addressing the immediate, urgent needs of our communities and taking care of ourselves and one another.

As we prepare for spring, I invite all of us to think more about how we can create sustainable work and life plans that foster the change we seek while also providing us with more balance—which will allow us to be in the struggle for the long haul.

I see the work of GIFT and the content of the *Journal* as ways for us to stay more connected and to take care of one another as a network of social justice fundraisers. So often, many of us find ourselves isolated and unsure how to best mobilize resources for the causes we care so deeply about.

In this issue, we first hear from Young Nonprofit Professionals Network about their recent 10-day campaign that more than doubled their goal to raise over $20,000 in honor of their 10-year anniversary. Then Paul Jolly shares some of his tips and lessons learned for major gift fundraising. Randall Quan builds off his workshop at the Money for Our Movements conference by sharing strategies for writing successful grant proposals. Last, we hear from Kim Bobo, former executive director of Interfaith Worker Justice, about building an engaged board of directors.

We're also excited to announce the launch of GIFT's new training series, Resourcing Our Communities, Building the Next Economy: A Grassroots Fundraising Training Series, which will offer introductory, advanced and training for trainers institutes over the coming year. Check our website for more details. Applications for the introductory training in Oakland are due March 27th.

Thank you for reading! And as always, please be in touch with your feedback, suggestions and ideas for the *Grassroots Fundraising Journal*!

Ryan Li

10 Years, 10 Days, $10K

By Kiara Boone, Autumn Hubbard & Trish Tchume

THIS ARTICLE SHARES THE PROCESS and lessons learned from the Young Nonprofit Professionals Network's (YNPN) first targeted online giving campaign centered around the organization's tenth anniversary. YNPN is an organization that strengthens the social sector by activating emerging leaders and connecting them with resources, people and ideas. To celebrate our first decade as a network and preparing for the decade to come, we launched 10 Years, 10 Days, $10K—a sprint peer-to-peer fundraising campaign designed to raise money and support in a condensed and specific amount of time.

We had a couple of goals for the campaign: First, we wanted to celebrate a milestone birthday. Having a genuine milestone—a 10-year anniversary—gave people a strong reason to pay attention. We wanted to make sure that people were aware of what we had accomplished in the last 10 years and how we planned to continue to build on that success for the next decade.

Second, we were specifically raising money for the infrastructure that would power the next decade of our work. Over the last three years, the number of YNPN chapters has grown by 60 percent! It was clear that YNPN needed to make a big investment in the people, data systems and resources that would take our work to the next level—so we launched the campaign.

Staff and Board Participation

To succeed with our strategy, participation from the national board and staff was critical in designing and monitoring the messaging, online tools and momentum. The key roles were as follows:

- We identified two campaign committee chairs from our board fundraising committee to hold us accountable for actually doing the campaign this year by helping to set the strategic vision for the campaign, drafting a work plan, and engaging the board around giving and outreach.
- The national director's primary role was to advise the overall strategy, identify potential donors and donor groups, and make major asks.
- The director of communications and network engagement set the outreach strategy, developed all of the content for social media, managed the crowdfunding site, and coordinated all of the acknowledgements.

Our Fundraising History

Historically, YNPN National has received almost 100 percent of its financial support from foundations through grants or sponsorships. The national director has been primarily responsible for developing and managing all of these grant relationships.

Prior to 2013, the national board played only a minor role in either institutional fundraising or individual donor cultivation. So, building the board's confidence and capacity to fundraise became a significant focus of 2013 to great success. With the help of one-on-one board member coaching from our fundraising chair, individual goal setting, and sharing of board strategies, board member fundraising increased over 150 percent in 2013.

Creating a Fundraising Strategy

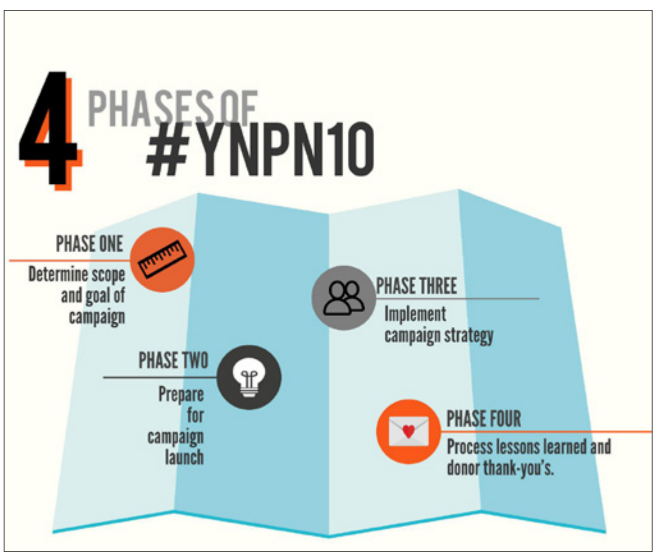
After the success of individual appeals made by YNPN National's board to family and friends in 2013, the board's fundraising committee launched a wider-reaching targeted individual/alumni giving campaign. The committee members hoped to capitalize on YNPN National's tenth anniversary year by engaging with YNPN alumni.

Recognizing that we had never embarked on a coordinated individual giving campaign before, the committee approached the campaign primarily as an opportunity to learn best practices and to lay the foundation for a new YNPN National fundraising strategy, rather than as a core source of funding for that budget year.

We decided that the campaign had to reiterate the power of YNPN National. Here are a few examples of the messaging we used:

- The power of network: One in five members has been part of more than one YNPN chapter. Wherever you are, so is YNPN.
- 10 years ago when YNPN National started, conversations about leadership were focused on building a pipeline to replace the predicted large number of people who were eligible for retirement. Through years of national level advocacy alongside grassroots programming, YNPN has played a critical role in shifting the conversation towards leveraging and supporting the talent that exists within the sector right now.

In June and July of 2014, the campaign chairs outlined four stages for the campaign:



Designing the Campaign...then Shifting Gears

The original campaign's primary objective was to serve as a pilot initiative to help YNPN National better assess the organization's fundraising and development capabilities. YNPN leadership also recognized the campaign as a tool to engage with YNPN alumni and current chapter leaders. In addition to the support from the board, YNPN wanted to engage network "champions" to promote the fundraising goals.

One in five members has been part of more than one YNPN chapter.
Wherever you are, so is YNPN.

In August 2014, after two months of campaign planning, our national director attended GIFT's 5th Money for Our Movements conference. The seminar on "Moving Towards an Integrated Fundraising Culture," run by the Progressive Technology Project (PTP), exposed her to the concept of sprint campaigns—a fundraising campaign with a limited duration and a specific fundraising target. This integrated approach to fundraising is driven by the idea that fundraising is organizing[1].

Our national director emailed us from the conference saying, "Okay, I know this isn't what we were planning, but hear me out…" When the rest of us on the planning committee heard the idea of doing a shorter, sprint campaign that would tie the 10 year anniversary to raising $10,000 in 10 days, we thought it was a great idea. We knew it would mean a lot more work up front, but we loved how a sprint campaign could energize people. After considering the advantages and significant challenges of altering the campaign to operate as a sprint campaign, the board agreed that it presented an opportunity for YNPN to engage in an exciting and thoughtful learning process. So the 10 Years, 10 Days, $10K Campaign was born!

Sprint campaigns are ideal for crowdfunding platforms and work best when they run for a set, concise period of time. Setting a deadline creates a sense of urgency and purpose. The campaigns target a specific audience related to the goal of the fundraising

1 "CRMs & Fundraising Campaigns: An Integrated Approach" By Tomás Aguilar & Mark Sherman, Sep-Oct 2014 *Grassroots Fundraising Journal*

A Change in Plans:

Halfway through the planning process, #ynpn10 undertook a strategic change in scope and direction. What changed, and how did it remain successful?

Timeframe	30 days	10 days
Audience	Personal Networks, YNPN Alumni, Chapter Leaders	YNPN Alumni, Friends, Supporters, Chapter Leaders and Members
Campaign Strategy	Personal network solicitation and social media	Email campaign and social media
Fundraising Goal	$5,000	$10,000
Board Role	Financial contribution, Personal networks	"Quiet Phase" build up, Personal networks
Champion Role	Personal networks	Social media video, Personal networks

Factors of Campaign Success:

1. Involved board members engaged on all levels
2. Use of Fund.ly
3. Big, audacious goals drew attention
4. Building support during quiet phase
5. Early content planning
6. YNPN alumni support

efforts. The idea is to engage a group whose interests align with the campaign purpose and goals.

We used Fundly to host the campaign and track the fundraising progress. For the duration of the 10-day campaign, we sent daily emails using MailChimp that were embedded with YouTube videos, complemented by Facebook and Twitter posts encouraging friends and followers to support the campaign. The campaign also identified "champions" (what we called members of the fundraising team), former national board members, previous chapter leaders, YNPN friends, and social sector leaders to serve as ambassadors for the campaign. As ambassadors, these individuals agreed to use their social and political capital to reach out to their networks for donations. Champions were asked to play an active role in telling their stories via YouTube to encourage people to donate.

The Results

The campaign was a huge success financially. By the end of the campaign, YNPN raised $23,429 ($8,564 online and $14,865 offline), more than twice the initial goal. Here are some notable figures:

- Our $10K goal was reached by day four of the campaign.
- The largest donation was $6,000 from a YNPN National board alumnus.
- The matching grant of $2,500 from a YNPN Chapter founder and leader was achieved within 24 hours.
- YNPN Alumni (national and local chapter) donated a total of $9,973.
- 76 percent of donors were new financial supporters.
- 22 local chapters and chapter leaders donated.

While many of our donors were millennials, we were proud of the age diversity among those who supported the campaign. In addition to the members and chapter leaders who supported the campaign (who fall solidly in the millennial age bracket), YNPN alumni (more of the Gen X crowd) and the parents and family members of YNPN members also supported the campaign. It was really great to see people of all generations recognizing the value of supporting emerging leaders.

We did notice, however, that our younger supporters were more likely to share that they supported our campaign and encourage others to support the campaign via social media. We suspected that might be the case, which is why it was important to choose a platform that made social sharing easy and accessible. Fundly was a dream to work with and looked a lot like Kickstarter, something we thought would be familiar and accessible to a lot of donors, particularly millennials.

Lessons Learned

Here are some of the lessons learned from the campaign:

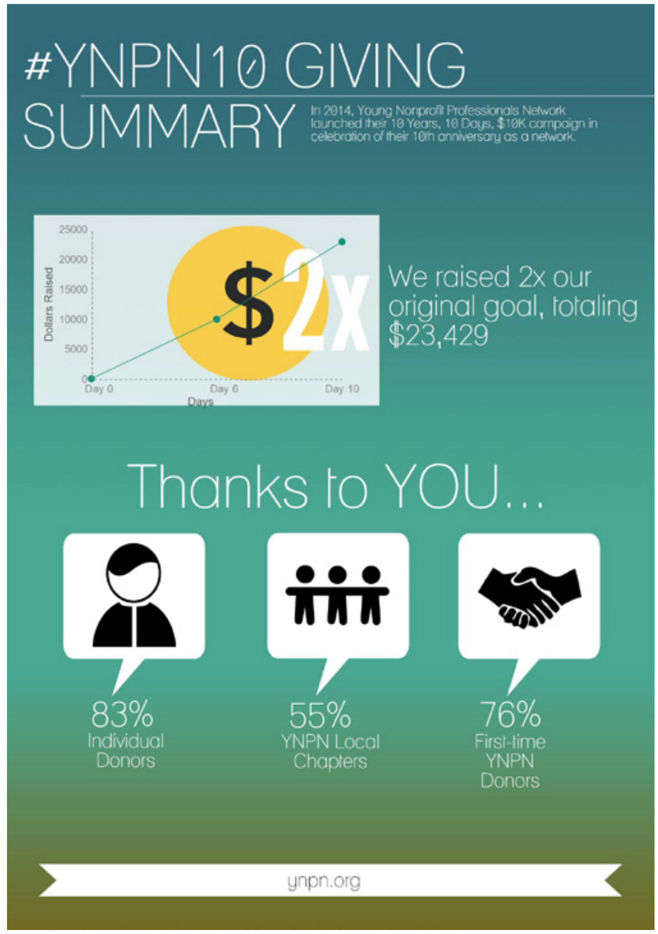
- A short and focused time frame can more easily move people to action and harness the energy of the board and staff.
- The September timing worked well because it was before the end-of-year mad dash and Giving Tuesday donation glut.
- Matching gifts can attract donors, but not always. YNPN was thrilled when the first matching grant of $2,500 by an individual donor was achieved within 24 hours. People act-

ed quickly to help secure the total amount of funds. However, the Chapter Leader Match sponsored by YNPN NYC did not generate the level of support we anticipated. In the future, it might be worthwhile to connect donating alumni from local chapters with current chapter leaders to encourage giving.

- Actively engaged board members made a huge difference in the planning and implementation of the campaign. Weekly planning and strategy meetings ensured that the team remained in constant communication.
- Campaign outreach was successful due to the early planning of content for the correspondence and videos. In the future, we would dedicate additional resources to ensure high quality videos.
- We also learned that things don't always go as you plan—and we should plan for that! For example, we thought for several weeks that a big celebrity (a household name) was going to be able to record a video for our campaign through a personal connection we had. It was getting down to the wire in terms of planning out the content for all 10 days, and whether or not we had this celebrity's video was going to affect the order of the entire content slate. So we ended up planning two content slates: one with the celebrity and one without. The celebrity connection fell through, but our content and the campaign still went so smoothly because of that advance planning. It was a great lesson in the importance of doing all of the work up front and preparing for a variety of scenarios.

Engaging the Funders of Tomorrow

In the end, our success was the result of a number of factors and the work of so many people. Our national reach greatly helped us. We are fortunate (for many reasons) to have a fantastic network of chapters and chapter leaders who believe in the value of what YNPN does because they experience it every day. Nearly 20



percent of our donations were from chapter leaders, and we had at least one person donate from 22 of our 40 chapters. Several of our chapters donated to the campaign as organizations as well.

Even though we're relatively young, we have served tens of thousands of young nonprofit professionals, and many of those alumni still continue to support YNPN even as they have "outgrown" the network. More than 50 percent of our original $10,000 goal was raised from alumni of our national board. Alumni engagement, for us, is critical not only for financial reasons, but because the young nonprofit professionals of today are the executive directors, board chairs and funders of tomorrow. One of our hopes is that as members move on from our network and the designation of "young nonprofit professional," they don't lose sight of the importance of developing the emerging leaders they work with. A campaign like this can be a reminder of the benefits they gained from the network and the great experience they had as a YNPN member and leader. ■

Kiara Boone, Autumn Hubbard and Trish Tchume are the development coordinator, communications coordinator and national director of the Young Nonprofit Professionals Network.

Triumphs & Trainwrecks in Major Gifts Fundraising

By Paul Jolly

WHEN I WAS ASKED TO WRITE about the transformation of organizations into major gifts fundraising powerhouses, I jumped at the chance. But as helpful as it is for novice fundraisers to read about successes, it is equally instructive to learn about situations that didn't work out. Stories about failures are harder to come by.

What follows is my list of the necessary ingredients for a successful major gifts program. Each point is illustrated with one example of stellar achievement and one example of a misfire. My role varied between participant, guide and witness. I have learned from all of these situations and hope you will too.

1. A Single List of All Prospects for Major Gifts

Success: As a new fundraiser carrying my box of stuff into my office for the first time, I passed my predecessor in the hall, who muttered, "There are 12 people who could give a million dollars to this organization." He was upset that he didn't have the chance to get those gifts. A week later, I called him up and asked him if he would talk about those 12 donors, and he was kind enough to agree. After a successful, three-year, $4 million campaign, we found that the 12 people on that list had contributed $3 million of the $4 million raised.

Failure: A social service agency had so much turnover and chaos in the development office that the newly hired development officer didn't know who the top donors and prospects were. She couldn't even locate any records of the donors listed on the plaque in the foyer of the building. So she asked me to make a list. I copied the names off the plaques, and folded them into a single list with friends of board members, current major donors, and attendees of a recent gala. But she was fired before she could act on the list.

Moral: Continuity is critical in ensuring that top donors are treated well. Make sure information (and even more important, relationships) are passed from one fundraiser to another.

2. Fundraiser and Executive Director Collaboration

Success: Over the course of four years in a fundraising job, I built a great relationship with the executive director. I was able to amplify that executive director's effectiveness by drafting every email and letter she wrote to donors, telling her who to call and what to say, and organizing her donor visits. She trusted me, did what I suggested, revised the drafts I wrote, and asked for help when she needed it.

Failure: I once worked for the founder of an organization. He was brilliant, but uneasy about fundraising. When I talked to him about how much time he would devote to fundraising, he said, "You are one of six people that report to me, so I will give you one-sixth of my time." It is a rational answer, and it is a reasonable amount of time for an executive director to spend on fundraising. But, by framing his commitment as my allotment of his time, he was evading his responsibility to build strong relationships with donors.

Moral: If the development staff and executive director are on the same page, great things can happen. If not, great things will probably not happen.

3. All Board Members Equipped to Fundraise

Success: I once knew an organization where every board member asserted, "We are not a fundraising board." None of them exhibited any shame about this fact nor curiosity about whether it served the organization. But a new and quietly ambitious fundraiser turned things around. By the end of her first year, every board member made a personal contribution for the first time. By the time she had been on staff for 18 months, the development committee members had each taken responsibility for a portfolio of donors, inviting them to events and thanking them for their gifts. They shared whatever biographical tidbits they learned about donors with the staff. And they promised to enlist the rest of the board members to do the same after they had some initial successes.

Failure: The executive director of a national association of social service agencies, exasperated that her board members were not raising money, asked me to train the board. Being a new consultant, I happily agreed without asking any questions. If I had inquired, I would have learned that the national office had been established by the coalition expressly for the purpose of raising money. I provided my standard "how to cultivate prospects and solicit gifts" presentation. The board members were firm in their belief that it was the ED's job to raise money, and therefore my efforts to instruct them were misdirected.

Moral: There is a role for every board member in fundraising. If you have people who are resistant to fundraising and are digging in their heels, find out why before you try to fix the problem. Be patient—organizations change slowly. And equip the most eager board members for success before you address the board as a whole.

4. Giving Circles at the $1,000, $2,500 or $5,000 Levels

Success: A community theater that enjoys an intimate relationship with its audience decided to create a $1,000 "Friends of X Theater" group. After initially balking, the board (on which I served) approved the plan. First, we made a list of people who might consider a $1,000 gift: friends of board members as well as enthusiastic audience members and donors. Then, we invited them to a series of pre-show gatherings where they could meet actors. Finally, we used a series of emails, letters and phone calls to solicit gifts. Forty-five people signed up as "Friends" in the first six months.

Failure: I suggested that another organization adopt a $1,000 giving circle. The staff fundraiser was initially reluctant to elevate some donors over others. I talked through her reluctance with her, and came up with a plan that I thought addressed every concern. For instance, instead of being listed separately, donors of $1,000 or more would simply have asterisks next to their names in the annual report. The fundraiser took the proposal to the development committee, which shot down the idea. The staff member later said to me that she had never been comfortable with it.

IF YOU HAVE PEOPLE WHO ARE RESISTANT TO FUNDRAISING AND ARE DIGGING IN THEIR HEELS, FIND OUT WHY BEFORE YOU TRY TO FIX THE PROBLEM.

Moral: If your culture is at odds with a particular fundraising strategy, you will need a plan that takes the culture into account. A development plan that is out of sync with the organization's culture is going to make donors queasy. But an organization's culture also needs to be challenged from time to time.

5. Ask Your Most Committed and Wealthy Donors for Major Gifts

Success: An environmental organization that got 90 percent of its income from foundations decided to implement a major gifts program. They started by hiring a grant writer so the fundraising staff member could focus on the new initiative. This allowed the fundraising staffer to support a well-connected board member (see sidebar on next page) in a special campaign that raised $200,000 in less than a year.

Failure: An executive director of a large national service organization decided to double the number of volunteers in three years, and used this as the focal point of a multi-million dollar campaign. The organization (which had never done a major gifts program) had no development staff—so she did the fundraising herself. Several board members were willing to participate, but the chair was reluctant. In the next two years, they were very successful raising money from foundations, but got only nominal gifts from individual donors.

Moral: You can start a major gifts program any time (I recommend now!). If your plate is crowded, begin with a list of 10 or 20 prospects. But if you want to see results soon, make sure the

How One Board Member Led the Effort to Raise $200,000 in Less than a Year

A board member of an environmental organization told staff she wanted to raise money for something special, and the staff came up with a project that was on their wish list but was not in their core budget. It cost $200,000. Staff composed a two-page summary of the need. The board member talked to her friends, people in her giving circles, her friends who were trustees of foundations, and people on her Christmas card list. Every time she approached someone she thought might already be a donor, she checked in with staff to make sure communication was coordinated. It took her less than a year to raise the $200,000, and now she is thinking about how to keep those donors engaged.

A board member that is this motivated and well connected is a rare treasure. Staff did many things right in empowering her to succeed. Too often, staff members think of a board member with an independent streak as a nuisance.

If there is no one like this on your board, you may be able to find a donor who cares enough about your organization to take on raising money for a specific project. Make sure to give that donor everything he or she needs. Say "thank you" often. And find out what kind of acknowledgement would be significant to that special person.

initiative is sufficiently staffed and fully supported by the board leadership.

6. Communicate Your Impact

Success: 2014 was the 50-year anniversary of a research institute that does social science research for religious organizations. They wanted to do a special campaign. Thinking about what they had accomplished over 50 years, they came up with several examples of the impact of their research. Considering impact was new for them. Like most social scientists, they wanted to stick to "just the facts." Nevertheless, they were able to come up with many instances where the organizations that commissioned their research made dramatic changes in their program because of what the research taught them. They set up a "dangling threads" fund, which allowed researchers to address provocative questions that remained unanswered after they had fulfilled the research they were commissioned to do. Donors contributed over $200,000.

Failure: An international human rights organization was funded entirely by foundations. They had just completed an ambitious strategic plan, and they wanted to fund their growth by creating an individual giving program. The challenge: boil down their 50-page strategic plan into three to five jargon-free pages that would make sense to a lay audience. It seemed simple, but it never happened. The executive director was immersed in the technicalities of the work, which only made sense to people in the field. He could neither translate it into plain, compelling language, nor delegate that task to someone else.

Moral: The elevator speech and the back-of-an-envelope drawing are apt metaphors for a quick, simple narrative about your work that will grab people and make them want to get involved. If you can't do that, it will be hard to persuade individual donors to join you.

7. Create a Calendar of Cultivation Events

Success: A theater in a suburban community was planning to move into the center of town. They hosted a series of dinner parties for civic leaders (politicians, real estate developers, leaders in the artistic community, and philanthropists). At each event, they explained their plans and invited advice. They got great feedback. Almost everyone who attended one of those dinner parties said, "Let me know how I can help."

Failure: An organization that raised money through two successful galas needed to dramatically increase their donations. The board decided that instead of two fundraising events a year, they should do five. They did not raise more money. They did burn out their fundraiser. And they postponed any hope of creating a major gifts program for at least a year and a half.

Moral: Events have a role in a well-rounded development effort but don't have to dominate staff time. Success ultimately depends on relationships with individual major donors. Small cultivation events are better for this than big ones that rely on sponsorships and ticket sales. If your events are distracting you from strengthening your ties with individual current or potential donors, your development efforts need to be reprioritized.

Each of these anecdotes is a story of organizational dexterity or rigidity. The transition from activity-based fundraising to relationship-based fundraising is tricky. Old habits are hard to break. If you sense there is untapped potential in your circle of friends, take a good, hard look at what you will have to do to cultivate them into donors. Best wishes for a year filled with many successes and only a very few failures. ■

Paul Jolly founded Jump Start Growth, Inc. in 2008, after 20 years as director of development for many different organizations. He helps organizations make the transition from grants-and-galas fundraising to building relationships with top donors.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Writing Smarter & Stronger Grant Proposals

By Randall Quan

ON THE SURFACE, writing a grant proposal seems like a straightforward process: Put onto paper who we are and what we need, send it to a foundation, and then get a grant. However, in reality, the process can feel anything but straightforward. And even if we get through that process, there are no guarantees that we will get any funding out of it. When the rejections come in, we tend to blame the funder for not understanding our organization, our needs, or even the issues with which we deal. We get frustrated because we do not know the magic words and phrases that would have helped us get funded. Or worse, we shift our program work toward the funding we think is available and away from our true mission and core competencies.

To make our proposals more effective—especially to foundations that are new to us—we might need to approach the proposal writing process from a different angle. By recognizing and understanding some of the limitations of the process, we can gain insights into and make strategic decisions about: 1) what to convey in proposals; 2) how to structure proposals to maximize clarity and comprehension; and 3) how to make more persuasive arguments.

This article is about making smarter and stronger written fundraising asks by taking an unconventional approach to understanding how grant proposals are reviewed, what readers look for, and how to avoid our own writing pitfalls. All the conventional wisdom about fundraising and proposal writing—such as building relationships, doing adequate prospect research, and aligning programs with mission—are still valid and important. This article introduces a few new perspectives and interpretations so that we can make more strategic decisions about writing our grant proposals.

While this article focuses specifically on writing grant proposals to foundations, the concepts are applicable to all types of written fundraising asks. Before you even start writing, it is important to acknowledge that at the heart of a winning proposal is having strong and high quality programs. Strong proposals may occasionally help bad programs, but strong programs—even with mediocre proposals—will be more consistently attractive to funders and successful in securing grants.

Building Confidence and Lessening Risks

Generally speaking, foundations are not big risk takers. They are responsible (at least in theory) for large sums of money and are accountable to their donors (if any) and to the public. They need to know that the monies they grant are being used effectively to advance their strategies and missions. All resources are limited (even for the largest of foundations), so decisions have to be made about how best to use those limited resources. Every time a foundation makes a grant, they take on the risk of that grant not achieving what they hoped. A failed grant is a lost opportunity to create change in the world, or more practically, a lost opportunity to have funded another program that might have been more effective.

THE FOCUS OF STRENGTHENING OUR PROPOSALS SHOULD BE TO MAKE THEM STAND OUT TO A PROPOSAL READER IN LESS THAN FIVE MINUTES.

The proposal review process plays an important role in helping a foundation build confidence in our programs and solutions and lessening the risk that a grant may not achieve what was intended. Foundations increasingly ask us to evaluate our work and provide evidence to confirm and prove our impact. They ask us to define clear and tangible outcomes so they are clear on what their funds are supporting. They put restrictions on how their monies can and cannot be used to contain their responsibilities and risks. They want to be confident that our organization is exactly what we say it is, and that our work will achieve the outcomes we say it will. And they somehow need to trust us at our word with their money. Building strong relationships with existing and potential foundations helps to build confidence in our organizations and goes a long way to helping foundations feel confident about our requests. Remember, the core definition of fundraising is building relationships.

With this perspective, much of the proposal review process can be seen as a way for a foundation to mitigate its risks. We should, therefore, develop our proposals with this in mind and address their concerns deliberately and directly, while demonstrating alignment between your missions. While different foundations have different levels of openness to taking risks, they all want to have confidence and trust in our ability to carry out our work

Time Is of the Essence

If we understand a bit about how foundations review our proposals and give out money, we can gain some insight into how we could submit stronger applications to them. From a purely operational perspective—especially when approaching a foundation new to your organization—time constraints have a significant influence on how proposals are reviewed. Given that foundations receive hundreds, sometimes thousands, of proposals each year, the average amount of time that is given to any single proposal can be tremendously small, especially compared to the amount of time and effort we put into preparing it.

Imagine receiving and having to read hundreds of proposals. Particularly if the foundation has specific deadlines (as opposed to rolling deadlines), reviewing all the proposals must be done quickly. For example, several years ago a small foundation in New York City received 779 proposals over the year, of which only 179 (or 23 percent) organizations received grants. Of the 179 grants, only 44 went to first time grantees (which shows how it can often be hard to build new funding relationships). If the 779 submissions were equally distributed over three deadlines, there would have been about 260 proposals per funding cycle. The program officer would have had three days to review all the proposals and come up with a short list of possible proposals to fund. If the program officer read seven hours a day for three days straight, each proposal would have been reviewed for an average of just less than five minutes.

From a cynical point of view, we might view the bulk of the proposal review process as a process to manage time and numbers, not necessarily one to find interesting or impactful programs and organizations. With a program officer's review time at a premium, the focus of strengthening our proposals should be to make them stand out to a proposal reader in less than five minutes.

Less Is More

Writing a proposal that confidently communicates who we are, what we do, and what we need—all in less than five minutes—becomes much harder when our proposal is constrained by page limits (or character limits, as may be the case for electronic submissions). Most often, our strategy is to cram as much information as we can into that limited space in hopes that the proposal reader will get the fullest picture of who we are and be compelled to award a grant. We even try to be clever and stretch the limits by playing with font sizes and page margins so as to include another several lines of precious words. Sometimes we try to go outside of the page limits altogether by adding multiple attachments. We often think that the more we write and communicate about ourselves, the more likely the reader will understand who we are and award us a grant.

The effect of this approach, however, actually runs counter to what the proposal reader is trying to do—remember the salient points about our organization and request, and repeat them to someone else (such as a senior program officer or even the foundation's board). By cramming as much as we can into the proposal, we hinder the proposal reader's ability to comprehend and

TO BE MORE EFFECTIVE IN MAKING OUR CASE, WE NEED TO CONVEY LESS, NOT MORE.

remember what was read. We dilute any sense of priorities and may lose the attention of the reader.

To be more effective in making our case, we need to convey less, not more. Thus, we have to be very intentional and strategic about what we choose to include and not include.

What to Convey in a Proposal

Given these challenges, we need to be deliberate about what we put into our proposal. So, after we have done our research on a prospective foundation and have determined that there is enough alignment between our work and theirs, we can start planning out our proposal. There are five main components for effective fundraising writing:

1. Describe a compelling need or situation;
2. Promote a vision for change;
3. Present a clear solution to need or situation;
4. Convey confidence about your capabilities; and
5. Ask for a specific and justifiable amount.

1. Describe a compelling need or situation

Foundations are increasingly looking for organizations that present clear and defined problems that are addressed by focused programs. We need to show the reader that we understand the problems and issues that our organization will address. Describe the scale and scope of problems or needs—how big the problems or needs are, and the extent to which they affect our communities and constituents. To make these descriptions compelling, we must convey a sense of urgency by creating time pressure. We can explain the relevant trends of these problems and, perhaps, the consequences of doing nothing.

The challenge here, though, is not presenting a problem that is larger than we, or any organization, can address. Oftentimes, we try to present our case to the proposal reader by describing all the problems, needs and ills faced by our constituents—that if we can get funders to see how big and pervasive a problem is, then they will fund us. However, in the "problem-solution" framework, while large problems, such as poverty, can provide a context to our work, there is no possible way we can claim to solve it, particularly in the context of a single grant proposal. By highlighting very specific problems on the other hand, we can explain in our proposals that we have specific and effective solutions to those problems. In fact, we should only present problems that we will address directly. This will give the reader a sense of how deliberate and focused we are.

2. Promote a vision for change

We are not trying to "sell" the problems to the proposal reader—we are trying to "sell" our solutions. Many times, we try to convince the reader that we deserve funding because we can identify a problem. By doing so, however, we neglect to focus on our vision for change. Given the problems and needs we identify, we need to let the reader know very directly that our organization has a vision for change that represents success to us (and to our communities and constituents). Ultimately, that vision is what a funder is supporting so it's important not to focus too much on the problem.

Our proposal should explain the change we are trying to achieve and how lives will be improved as a result of our work. Too often, in addition to overwhelming the proposal reader with the problem, our proposals go right into the details of a specific project or program without providing a broader vision of the success we want. We miss the opportunity to provide context to the more detailed program outcomes and deliverables for which we're seeking funding.

3. Present a clear solution to the need or problem

After we articulate our vision for change, we must present a clear and realistic plan for addressing the needs or problems. Generally, this is our program plan, including the program outcomes and deliverables that we plan to achieve, usually, over the course of a year. Our program plan is one part of a logic model that shows the direct relationship between the need or problem and the proposed program strategy. Then we need to show how the activities in our program strategy lead directly to specific deliverables, which in turn lead to medium-term changes, and eventually to longer-term impact.

Program officers look for proposals that have feasible and realistic program plans. It is not enough to just explain the problems or even our vision for change. We need to show that we have a concrete plan for achieving success. A strong and realistic program plan—including a realistic budget—shows that we are active and successful in predicting and preparing for different variables. Strong and accurate plans are indicators of organizational competence, and organizational competence helps build a foundation's confidence in us. This increases the likelihood of your proposal being funded.

4. Convey confidence about our capabilities

Even if we may have the most feasible and realistic plan to create the change we envision, the proposal reader needs to feel confident that our organization has the knowledge, experience and skills needed to actually carry out that program plan. Higher confidence in our capabilities also mitigates any concerns a reader might have about our proposal.

Aside from describing the staffing, systems and structures that support successful implementation, we can articulate our accomplishments to demonstrate our proven track record. If an organization is smaller and/or newer, without a long history of success, it can be helpful to highlight partnerships and collaborations with other more established and/or recognized groups or coalitions. It's also important to show the depth and ability of the board that oversees, governs and supports the organization. Even asserting that 100 percent of our board donates to that organization shows that they are literally and figuratively invested in the efforts.

HOW WE STRUCTURE OUR WRITING HAS A DRAMATIC IMPACT ON HOW WELL OUR POINTS ARE UNDERSTOOD.

5. Ask for a specific and justifiable amount

It can be challenging to determine the specific amount to request. Our research on the prospective foundation can help provide some markers that make determining the number easier. Groups like the Foundation Center can be helpful resources to learn about a prospective foundation's range and average size of grants. Generally, organizations new to a foundation should ask for amounts on the lower end of the foundation's grant range. For the foundation, this is again about weighing the risks and benefits associated with giving money to an organization with which the foundation does not have a relationship. Deeper analysis of grant lists over several years may show what similar organizations got as a first grant when they were new to the foundation. Conversely, similar analysis might show that the larger grants in the range probably went to organizations that have received multiple years of grants from the foundation. This is another example of how stronger relationships can lead to more successful fundraising.

Whatever we request in a proposal needs to be justified. We have to show that the amount is directly related to the success we are trying to realize. Our budget should account for the reasonable costs needed to support program efforts and activities and explain why they are required. Expenses that may seem extraneous or out the ordinary should be explained with appropriate rationale.

Structuring the Proposal

With limited time and space, the challenge facing us is making sure that our proposal stands out. How we structure our writing has a dramatic impact on how well our points are understood and remembered. Furthermore, we need to recognize that, even within those five minutes, the reader is probably not reading the entire proposal very closely. Instead, they are probably skimming the text and deeply reading only selective parts.

Therefore, writing a grant proposal is different from writing, say, an essay, where the writer makes a hypothesis, sets out arguments, and makes a conclusion at the end. If a proposal reader is skimming, they are usually reading just the first few sentences of each paragraph or section. If we write the proposal like an essay with the conclusions at the end of paragraphs and sections, then the skimmer might not get to them. Thus, we need to lead with our "conclusions" to ensure those are the points that are picked up and remembered. The most important information should be at the top of each paragraph and section with the details at the end. This way, if the proposal reader is skimming, they will still get the main points we are trying to make.

Whenever possible, we should alert the proposal reader to what they will be reading by providing short introductions or overviews in the first paragraph of each main proposal section. For example, instead of jumping directly into program descriptions, we can introduce that we have three programs and then name each program, before going into more detail about each program in subsequent paragraphs. If the proposal reader doesn't read beyond the first paragraph, they will still know that we have three programs and the names of those programs. If the proposal reader reads all of the paragraphs in the section, then they will get a more detailed summary.

Putting the biggest, most important information at the top means using strong topic sentences to make our points. We want to present a perspective or point, not just the facts. If the proposal reader does not get to the facts, they still walk away having read what our overall point is. Facts, data and statistics support an argument but do not make the argument.

For example, the following was taken from a real proposal:

"According to the latest census figures, the population consists of 34 percent African American, 26 percent Latino/a, 22 percent Caucasian, and 11 percent Asian. In the last five years, Asians have comprised the fastest growing immigrant group in the neighborhood."

As written, a reader might assume that the point of these sentences is to highlight Asians in the community. In reality, the writer wanted to express that this was a diverse and changing community. If they actually began the paragraph with that point—"This

PAYING ATTENTION TO HOW DIFFERENT INDIVIDUALS PREFER TO RECEIVE INFORMATION AND HOW THEY CAN BE INFLUENCED PROVIDES US WITH INSIGHTS THAT SHOULD AFFECT OUR WRITING TONE.

is a diverse and changing community"—their intended meaning would have come across much more clearly.

Making a Persuasive Case

Making a persuasive case—especially one tailored to the specific foundation or even a specific proposal reader—can help push our proposals into winning territory. Paying attention to how different individuals prefer to receive information and how they can be influenced provides us with insights that should affect our writing tone. We can adapt Greek philosopher Aristotle's framework for persuasion, which he divided into three main parts—ethos, pathos and logos—to provide us with a way to sharpen our proposal.

Ethos

From the Greek word for "character," this concept refers to an individual's credibility and trustworthiness. We can stretch this definition to our proposal writing context and say that ethos is about appealing to an individual's sense of right and wrong. Arguments using ethos emphasize the difference between what is right and what is wrong and try to align with a reader's similar perspective or side.

Consider the following example:

"It is a travesty of justice that this city allows the homeless shelter population to reach 59,000 people every night."

The words "travesty of justice" immediately establishes the ethos and will resonate more with a reader who prefers to hear arguments that use ethos.

Pathos

Pathos refers to persuading by appealing to an individual's emotions. An individual who prefers hearing an argument using pathos tends to align with the writer's emotions as well as the writer's perspective. Pathos can establish a strong emotional connection with a reader who then is more apt to listen to one's case.

Now consider a variant of the example above, now written using pathos:

"How tragic it is that 59,000 individuals, including children, have to sleep every night in a homeless shelter, without a safe and regular place to call home."

Note how the language evokes some fairly vivid imagery including children and a safe home. A reader who prefers pathos would tend to align with this statement.

Logos

Some individuals respond best to logos, or sense of reasoning. Arguments using logos tend to focus more on the consistency of the message, the logic of the reasons, and the effectiveness of supporting evidence.

Here is a version of the above example using logos:

"According to the nightly shelter records for the month, the average number of people sleeping in homeless shelters in New York City every night is about 59,000."

To some, particularly those who prefer pathos, this example can be bland. For someone who prefers logos, though, it provides a clear and supported assertion which is irrefutable.

If we do our prospect research, we can probably develop an opinion about how the foundation may align with one of these types of appeals. From there, we can make very specific choices about how to write our topic sentences, descriptions and appeals in ways with which our intended audience can align. These are subtle shifts that could help make our case for funding.

At the same time, it is important to recognize that our own organization has a preference for either ethos, pathos or logos. We have to be aware of how much we may be changing our own identity in order to appeal to another. It may not be helpful or advisable, for example, to write a proposal in logos when we are strongly (and publicly) ethos-oriented because it may not be an accurate portrayal of who we are and what our values are.

Writing a grant proposal can be daunting and frustrating. However, if we come at the exercise from a different perspective—one that focuses on the constraints that both the reader and writer face—we can find ways to strengthen our asks. We can focus on making sure that we have the right information in the proposal and are responding to any underlying concerns the foundation may have. We can be deliberate about how the writing and proposal are structured to ensure that our salient points come across effectively. And we can utilize writing tone to make our case more persuasive. By doing so, hopefully we'll have more success with our grant proposals. ■

Randall Quan is the managing director at Community Resource Exchange.

PHOTO CREDIT: OUR WALMART CAMPAIGN

Kim Bobo with board member Ken Brooker Langston in front of the Walton Family Foundation on Oct. 16, 2014. Walmart workers and community supporters were called on Walmart and the Walton family to pay $15 an hour and provide access to full-time hours.

Building Awesome Boards

By Kim Bobo

I RECENTLY ATTENDED A TRAINING for executive directors and development directors where the facilitator asked if anyone in the room had a wonderful board of directors. My hand shot up. The facilitator looked at me with astonishment on her face and said, "In 20 years of working with nonprofits, I've never met an executive director who thinks he or she has a great board."

Honestly, I was surprised. Nothing my organization does seems all that special, but she suggested I should write a short article about building a great board. So, what follows are some of my thoughts on how an executive director can build a great board of directors.

Recruit good people who are willing and able to work. I have several criteria for board members. They must be committed to the issues, connected to the communities we serve, and willing and able to dedicate time to the work. I do not just want prestigious names on a board list. I want real people who can help build the organization. And, I want nice people who work well with others. One or two contrary people can really undermine a good board. Try to keep difficult people off your board—keeping them off is much easier than getting them off once they are on. My board of directors has a board development committee that recommends people to the board. I work with that committee in finding and vetting potential candidates.

Make sure you have terms and term limits. No one wants to join a board forever. People should be recruited for a term of service and asked to recommit if the relationship is working for both the person and the organization. Placing a limit on terms so everyone rotates off eventually is also necessary. It brings freshness to the board and creates a natural end point for removing board members who are not a good fit with the organization.

Be clear on expectations. Work with your board on developing a detailed set of expectations for board members. In addition to being helpful for the current board's effectiveness, this will assist you when recruiting new board members who need to know what to expect. To compliment the generic expectations, creating a specific agreement annually with board members about what they can and want to do to help build the organization is crucial. We call this annual agreement our "Board Covenant."

Welcome and orient new board members. New board members should receive a board orientation packet and be given an in-person orientation led by a combination of board and staff members. The orientation packet is simply a compilation of the basic documents a new board member should have such as recent board meeting notes, financial documents such as and budgets, and organizational policies.

Help board members get to know one another. One of the reasons people serve on a board is to get to know other people with similar values. Make sure there is time built into your meetings to allow people to socialize and get to know one another. Board members who know one another work better together and feel more connected to the organization. They will look forward to board meetings because they will be meeting with friends.

Make meetings fun. Board meetings should be interesting and engaging. Provide time for small group work. Ask the board to grapple with meaningful and thought-provoking questions, rather than simply sit passively and listen to reports. Think creatively about how to get what you need from the meetings. Do your best to respect people's time by starting and ending meetings on time.

Provide board members with good information. Board members cannot make good decisions if they don't have good information. Board members don't live and breathe issues like staff members do, so they have to be reminded of background and history on campaigns and issues. Years ago, I read an article that said, "Boards have no memory, and boards don't read." Neither is completely true, but consider this sentiment when preparing for meetings. No matter how many times you have sent out some document by mail or email, don't assume everyone has read it.

Help board members do what they want (and promise) to do. Every board member wants to be helpful and productive. But people's lives are busy, and many things can get in their way. Thus, as directors, we must build in time to help board members do what they want to do. They may need reminders, more information, some encouragement or some training. Don't assume people will follow through without assistance.

Affirm, affirm, affirm. A director must always affirm his or her board. Affirming is good for the director—it reminds the director that these volunteers do amazing work for the organization. When board members are affirmed, they feel valued and thus inspired to continue and deepen their commitment to the work. We all need and want to be affirmed. The director must play a lead role in affirming the good work of the board members. When asked about my board, I always reply, "I have the best board ever." Indeed, I believe this to be the case, but directors should always speak positively about their boards.

Share the good work the board does. Help staff members and other board members know about the important work board members are doing. Board work and engagement can be shared at staff meetings, in written reports and at board meetings.

Help those who can't participate transition off the board. Sometimes things going on in people's lives prevent them from fully participating in the board. Either the board development chairperson, the board president or the director can have a conversation with that person about resigning from the board. Inactive board members are demoralizing for others.

Seek ways to engage and promote your board members. Think of perks and opportunities for engaging and promoting board members. Ask them to speak at press conferences, promote their articles, invite them to share their expertise, or introduce them to people that would help them in other parts of their professional lives. Board members give a lot to the organization. Find ways to give back to them.

Be thankful for constructive criticism. Even though it is tempting to be defensive when a board member criticizes us or something the organization did, be sure to thank the person for the feedback. Usually, they are only trying to help. We should be grateful that the person brought the concern to us.

Turn challenges into opportunities. Whatever challenge you are facing, it probably is an opportunity to get the board more engaged. Have you been sued? Call a special board meeting to grapple with the problem. Are you going through a leadership transition? Create a board transition committee. Is there tension with another organization? Engage a group of board leaders in addressing it. Having the board grapple with serious issues is good for the outcome of the challenges (because board members are usually collectively wise) and good for them. Grappling with challenges helps board members get more deeply connected with the organization.

Acknowledge that most board problems are your fault. When my board is not doing what I need it to do, it is usually my fault and not theirs. I haven't organized them well, I haven't given them adequate information to do something, or I haven't equipped them to tackle a problem. Board problems usually mean that the director is not working well with and supporting her or his board. When I own my faults and do a better job organizing my board, the problems usually go away. Board members want to help, but they must be supported, encouraged, affirmed and organized. Directors can't sit back and wait for their board to operate wonderfully. We must organize them to be wonderful. They want to be wonderful. They can be wonderful. But only when directors help organize them to be wonderful.

My board is wonderful. I love each member. Yes indeed, I have the best board ever. ■

Kim Bobo was the founding executive director of Interfaith Worker Justice from 1996 to 2014.

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