



Grassroots Fundraising Principles and Best Practices Toolkit

Prepared for MAG-NET Anchor's Initiative Webinar Participants
by Vanessa Huang

Table of Contents

1. Understanding Your Relationship to Money
5. Grassroots Fundraising: What's the Point?
6. Using this Toolkit: Key Terms and Methods
7. Fundraising = Friend-Raising!
8. Building Your Volunteer Fundraising Team
9. Key Tactics to Consider for Your Grassroots Fundraising
10. Head, Heart, and Hands! Mapping Your Collective Fundraising Body (Assessment Part 1)
11. Identifying Where to Focus Your Fundraising Resources and Time (Assessment Part 2)
12. You Can Do This! Fundraising Campaign Planning Worksheet
13. Acknowledgments and Resources

Understanding Your Relationship to Money

In order to fully engage with our transformative work as organizers and fundraisers, we must also understand the financial taboos, stories, and safety strategies we've inherited or adopted, and imagine new possibilities and strategies in organizations and communities that are rooted in collective safety, access, and liberation.

By understanding our own relationship to money, and discovering any taboos or blocks we may be holding, we can fully embrace and inhabit our potential as leaders; effectively plan and integrate grassroots fundraising strategies; and organize our comrades, friends, staff, and volunteers to join us in growing a culture of fundraising and support.

Take 15 minutes to write out some reflections here on your money history. No one will read this but you. Some questions you might consider:

- How did your parents or primary caregivers handle money? Did they disagree? How did you feel about the way they handled money?

- Did your family experience significant financial change during your childhood? How might that have impacted your relationship to money?
- Did you have more or less money than your friends? What beliefs about relationships and money did you develop as a result?
- How did your relationship to money compare to that of your caregivers or siblings? If different, do you have a sense of why?
- Could you discuss money with your family as a child? And today?
- Did you have to work at a young age? Did you choose to work? Did you not have to work at all? What beliefs/values did you develop about money and work as a result?

- What were your early money messages?

- And what did these messages teach you about how to relate to money?

- How might your money history affect you today?

- How does your organization handle and relate to money, and why?

- What is your organization's fundraising philosophy, whether explicitly stated or implicitly held by its dominant culture or leadership?

- How might this philosophy and your feelings about it support or hinder your organization's grassroots fundraising work?

- How has the Occupy movement affected your organization's philosophy, and your own?

Grassroots Fundraising: What's the Point?

Jot down some key grassroots fundraising slogans onto the picket signs. Feel free to find some winning slogans from the "Word Credit Union" below.

Word Credit Union of Key Fundraising Slogans:

Fundraising is F-U-N, and for All of Us!

The Culture We Want is the Culture We Need!

Whose Streets? Our Streets! Let the Data Wait!

Fundraising is Boring, and for One Paid Staff! Recruit Great Staff!

Sell, Sell, Sell! Fundraising is Brand Making!

Take the money and run!

Go, Go, Data Entry! You Keep Us in the Streets!

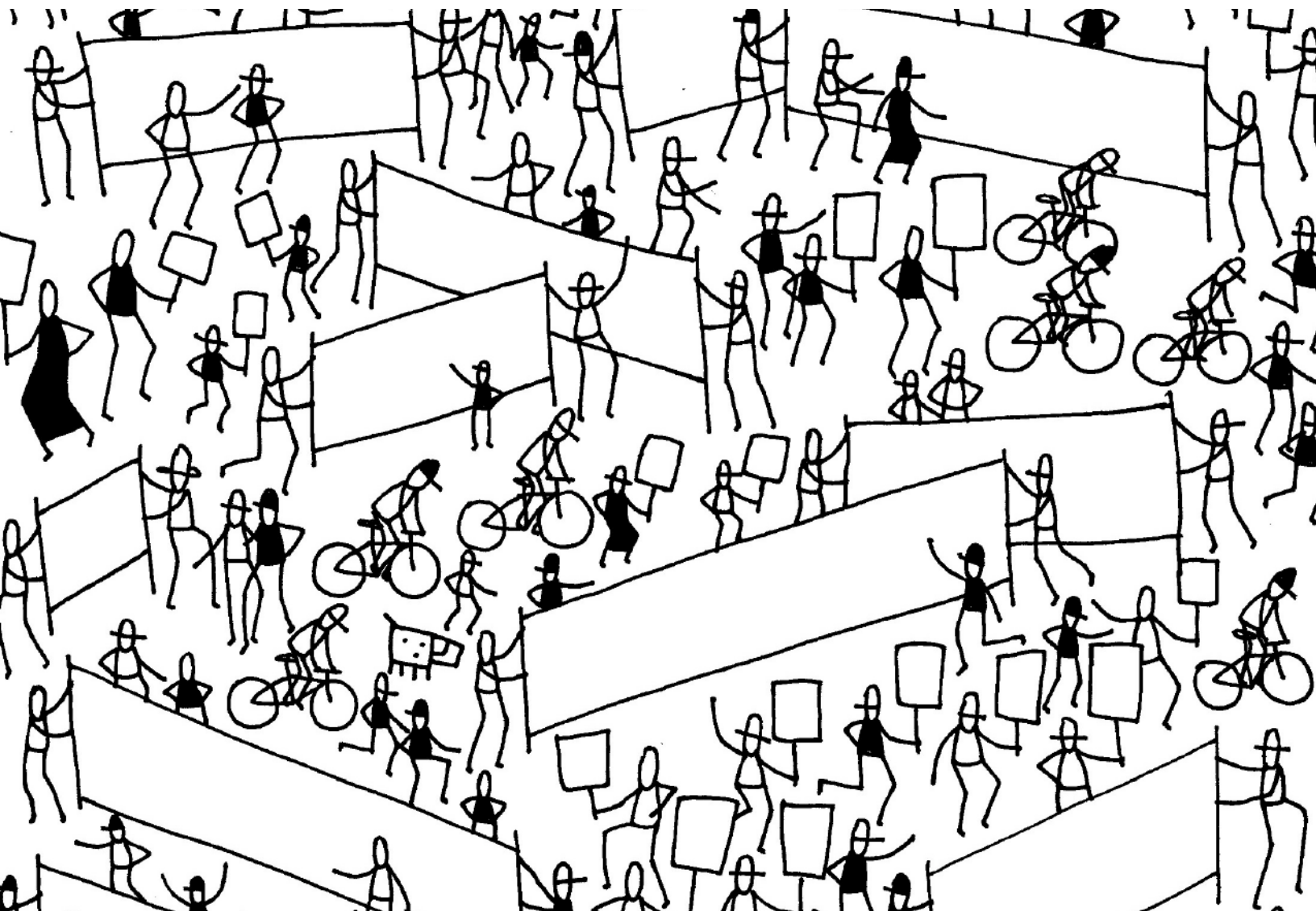
Segment, Segment, Segment!

Fundraising is Friend-Raising!

Thank you, thank you, thank you, thank you!

Ask for specific amounts!

Ask the general public for whatever you can get!



Using this Toolkit: Key Terms and Methods

- **Acquisition:** Getting prospects to give for the first time.
- **Appeal:** Request for support from a prospect or donor.
- **Conversion rate:** Percentage of first-time donors who give again.
- **Database:** A key component of your fundraising systems. Consistent data entry is a building block to develop, maintain, and strengthen appropriate relationships with many donors.
- **Donor:** Broadly defined, a donor is anyone who supports your organization by contribution resources, including time and money.
- **Donor communications:** A key way to enhance relationship with your donor base over time. Every communication should not be only an appeal.
- **Mobile giving:** A fundraising tactic using wireless technology to enable prospects and donors to make donations via cell phone.
- **Prospect:** A potential donor. Prospect research helps you assess whether people might be a good match to pursue.
- **Prospecting ABCs:** “Friend-raising” with specific prospects and donors who have the Ability to support your organization, who Believe in your organization’s cause, and with whom you have Contact.
- **Retention:** Getting donors to give again and again until they donate out of habit.
- **Segmenting:** The process of using your database to make lists of different types of donors, which can help you give each donor the type of attention they want. This helps focus your strategy on donors loyal to the organization, rather than to a person or event.
- **Social media:** The use of online and mobile-based technologies to facilitate connection and dialogue amongst users. Popular social networks include Facebook, Twitter, and Youtube. Can be effectively harnessed to integrate into fundraising strategy and campaigns.
- **Upgrade:** Getting donors to give more than they gave before, and move from “habitual” to “thoughtful” donors. Almost always through personal asks.

Fundraising = Friend-Raising

“We appreciate all gifts and all motives for giving. But our best chance of getting a donation year in and year out is by building a relationship with the donor—a relationship that transcends any of the people currently working for the group and that continues through any number of changes the group may undergo.”

— Reliable Fundraising in Unreliable Times

The key to building such relationships is knowing our Prospecting ABCs:

- Ability to give in the way you need (the least important factor in identifying prospects)
- Belief in your cause, or a similar cause (very important criteria)
- Contact with someone in your group who will ask for donations, or is willing to have someone else use their name when asking (the most important of the three criteria).

Who already is on your team that fits these criteria? Build your base of donors using your overall vision (e.g., media justice) and current organizational priorities (e.g., advancing a campaign, expanding grassroots leadership. Prioritize your strongest ABC supporters, and brainstorm who you can ask to connect you with other donors who fit your ABCs:

1. Who's most passionate about your organization? Brainstorm 20 specific people who would be upset if you had to close. Are they donors? Members? Leaders? Board members? Campaign allies?
2. Who also cares about your organization, though maybe not as much as the first group? Again, brainstorm 20 people and who they are.
3. Who supports you more casually? Again, brainstorm 20 people and who they are.

Sample Prospect List:

Name of Prospect	Contact Who in your organization knows this prospect?	Belief How do you know they care?	Ability What specific amount will you ask for?	Who Will Ask Should their contact ask, or someone else who use their contact's name?

Building Your Volunteer Fundraising Team

Building a base of donors who volunteer time takes patience—just as with building a base of financial supporters—and recruiting volunteers is critical to the success of your grassroots fundraising. Some questions to consider as you build your team:

- How will you set up a culture and system of fundraising that supports and empowers volunteers to engage, take leadership, and be reliable and accountable? What motivational barriers might you account for to move more members, leaders, staff, and board toward enthusiasm and community building around fundraising.
- How can you best support the development staff, or whoever is managing the grassroots fundraising plans and coordinating the fundraising team? Do they have the physical space and access to materials they need? Does the organizational culture understand and support their work plan? What else is needed?
- What do you actually need volunteers to do? Identify needs and make a timeline of when those needs will arise.
- Who can actually help you meet those needs? What specific skills do your contacts have? As with asking donors who give money, ask volunteers for a specific amount of time, or a specific activity, for a specific purpose/goal.

Key Tactics to Consider for Your Grassroots Fundraising

Here are some key fundraising tactics to consider integrating into your fundraising campaigns and overall capacity building.

Tactic	Outcomes and Considerations	Lead Time	Financial Cost
Face-to-Face Ask	50% say yes. Definitely supports personal connection.	Days to couple months. Includes inviting prospect or donor to meet.	Perhaps coffee or tea, perhaps staff time, etc.
Phone Call or Phone Bank	20–25% if personal call; 15% if call to current donor from unknown caller; 5% otherwise. Great second option for donors hard to visit.	Days to weeks. Includes preparing call list, rap, and call record; coordinating volunteers.	Food for mailing party, staff time to coordinate planning and volunteers.
Email	10-20% if personal email and asker knows prospect personally; .5-1% if blasted to new prospects. Easier to reach many people. Can be easy to ignore. Great way to drive traffic to website.	Hours to weeks. Includes drafting and revising copy.	Perhaps monthly email blast or per-email fee, staff time.
Direct Mail	Use to acquire or retain donors. 10% if current donors; 0.5-1% otherwise. Personal note makes a big difference!	Weeks to couple months. Includes drafting and revising copy, printing, mailing.	Paper and printing, food for mailing party, staff time to coordinate planning and volunteers.
Social Media	Can become viral and reach donors' networks' networks. If consistently in dialogue, can support ongoing donor engagement. Can come across as impersonal if not done well.	Minutes. Includes ongoing listening and response to followers and fans, as well as adapting messaging to medium.	Staff time to monitor, review, contribute.
Special Events	Generates publicity; raises visibility. Supports relationship, community building. Can be great way to introduce prospects to work.	Months. Includes lots of staff time to coordinate planning, logistics, and events committee.	Front money for event space, food, performers, etc., and staff time to coordinate planning and volunteers.

Head, Heart, and Hands: Mapping Your Collective Fundraising Body (Assessment Part 1)

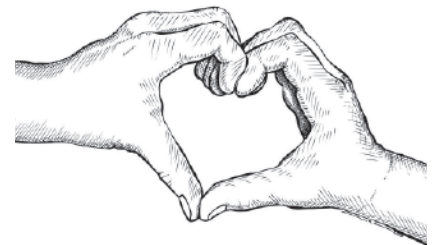
Before you take these learnings back to your organization and your work on the ground, take some time to do a big-picture reflection on how you are moving together when it comes to grassroots fundraising.

HEAD: What does your organization already know about grassroots fundraising?



HEART: How does your group feel about money and grassroots fundraising?

HANDS: How does your group relate to money and grassroots fundraising? Which grassroots fundraising practices are you and your organization already enacting well?



Identifying Where to Focus Your Fundraising Resources and Time (Assessment Part 2)

Use this assessment to decide where to focus your organization’s fundraising resources and time. For each question, identify where you currently land on a scale from 1 to 5, with 1 meaning, “Not at all,” and 5 meaning, “Completely.”

Fundraising Goals

- We have a fundraising plan broken down to specific goals based on program plans and budget.
- We have a fundraising goal, which we could express as follows: we need to raise \$ _____ in _____ period of time to accomplish. All staff are aware of the fundraising goal.
- All staff know how much we still need to meet the goal.
- All board members are aware of our fundraising goal.
- At least once a month, all board members are informed of how much we still need to raise to meet the goal.
- Fundraising goals and progress are visible in office via thermometer or other representation.

Fundraising goals total: _____ .

Fundraising Strategies

- Based on our fundraising philosophy, our fundraising plan calls for expanding (or creating, then expanding) a broad base of individual donors (if not so, skip the next question and move to #3).
- Our strategies are all chosen because they either acquire donors, retain donors, or upgrade donors.
- Our strategies are evaluated at regular intervals to ensure they’re performing adequately.
- Fundraising staff and key board members and volunteers understand the function of each strategy of our fundraising plan.

Fundraising goals total: _____ .

Donor Communications

- Donors receive information (newsletter, action alert, e-news) at least three times a year.
- Staff, board, and volunteers feel confident telling people to check your website to learn more about your org or to keep updated on programs, projects, fundraising.
- All donors receive a personal note or phone call or a personalized appeal at least once a year.
- Thank you notes are mailed as timely as possible, usually 48 hours to a week after receipt of gift.
- Subtract 3 points if you only thank larger donors.
- Subtract 5 points if you don’t send thank you notes at all.

Donor communications total: _____ .

“Back Office” Functions

- You have a database you like, and at least two staff people (paid or volunteer) who know how to use it.
- You back up data at least two times a week, and daily if you enter data every day.
- You store your backup data on a website or disk drive not in office.
- You have a reason for keeping someone on your mailing list who isn’t a donor (other than “outreach” or “maybe they’ll give some day”)—and that reason is recorded.
- You have systems in place to keep track of responses to mail appeals, newsletters, renewal mailings, and all other requests.

“Back Office” functions total: _____ .

Building fully aligned, thriving grassroots fundraising cultures, practices, and systems take a lot of care and tending. This evaluation helps your organization identify priorities. Within your current capacity and resources, be realistic as you create your work plan. Even if you can only take one or two actions a week, what should your priorities be? Make a plan to continue this vital work until you have an integrated practice and system across your fundraising body.

Assessment Scoring:

Fundraising Goals:

35-30: Right on track!
 29-25: Needs more support when available.
 24-20: Needs to be prioritized.
 20 or below: Urgent attention needed now.

Fundraising Strategies:

20-17: Right on track!
 16-12: Needs more support when available.
 11-7: Needs to be prioritized.
 6 or below: Urgent attention needed now.

Donor Communications:

20-17: Right on track!
 6-12: Needs more support when available.
 11-7: Needs to be prioritized.
 6 or below: Urgent attention needed now.

“Back Office” Functions:

25-20: Right on track!
 19-15: Needs more support when available.
 14-10: Needs to be prioritized.
 9 or below: Urgent attention needed now.

You Can Do This! Fundraising Campaign Planning Worksheet

As you plan specific fundraising campaigns or activities, and/or make your overall fund development plan, use this worksheet to identify the appropriate strategies, scope of the campaign, and tools to reach specific audiences and goals.

1. What are your priority organizational goals? For instance, advancing a specific campaign or collaboration? Developing new or existing leaders? Membership drives? Developing the somatic competency of organizational leadership? Positioning the organization to lead national policy? Integrating a new (i.e. environmental, prison, migrant, gender, disability) justice framework?
2. What are your current fundraising priorities? For example, are you primarily trying to acquire, retain, and/or upgrade donors? How many? And are you primarily strengthening fundraising infrastructure, or practicing in the areas of “back office” function, donor communications, fundraising goals, and/or fundraising strategies?
3. What other campaigns or activities are already in place or being planned, and how much of your annual budget will they require? What is your specific fundraising goal for this campaign? (e.g., \$5000 or \$50,000).
4. What strategies will best support your goals and priorities in the above three questions? How can you best integrate fundraising with program plans? As when planning a communications campaign, consider which audiences you need to build through this campaign in order to meet your primary organizational goals and fundraising priorities. How much will each cost/earn? How many volunteers and how much time does each require?
5. What capacity and resources do you have? Do you already have an active volunteer fundraising team? Realistically, how many volunteers can you acquire and/or coordinate for this campaign? Based on your responses, are there strategies listed above that fit better than others?

Acknowledgments

“Understanding Your Relationship to Money” adapted from exercise from Women’s Initiative for Self Employment curriculum

Some definitions from “Using This Toolkit,” and key concepts and offerings from “Fundraising = Friend-Raising,” “Building Your Volunteer Fundraising Team,” and, “Identifying Where to Focus Your Fundraising Resources and Time,” were adapted from *Fundraising for Social Change and Reliable Fundraising in Unreliable Times*

“Identifying Where to Focus Your Fundraising Resources and Time” and the image from “Grassroots Fundraising: What’s the Point?” were adapted from a Creative Commons image by Tom Civil.

Outcomes for “Key Tactics to Consider for Your Grassroots Fundraising” are from the “Grassroots Fundraising Strategy Chart” by Mimi Ho, adapted from “Choosing the Right Fundraising Strategy,” by Kim Klein and Stephanie Roth, *Grassroots Fundraising Journal*, Vol. 18, no. 3, June 1999.

Images of Bayard Rustin and the heart and hands from “Head, Heart, and Hands! Mapping Your Collective Fundraising Body,” were adapted from Creative Commons images from Ari Moore, Irishk, and Zeke Sikelianos.

Resources

Fundraising for Social Change

GIFT Training for Trainers Manual

Giving USA, 2011

Grassroots Fundraising Journal

Reliable Fundraising in Unreliable Times