

# GRASSROOTS CAMPAIGNS & ADVOCACY

*a toolkit to help you make change happen*



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# *Acknowledgements*

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The Leadership Conference on Civil and Human Rights is a coalition charged by its diverse membership of more than 200 national organizations to promote and protect the rights of all persons in the United States. The Leadership Conference works toward an America as good as its ideals.

The Leadership Conference Education Fund is a 501(c)(3) organization that builds public will for federal policies that promote and protect the civil and human rights of all persons in the United States.

Access this material online at [http://www.civilrights.org/action\\_center/toolkit](http://www.civilrights.org/action_center/toolkit).

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Dear Friend:

This toolkit was created with you in mind. Its purpose is to educate, equip, encourage, and empower you to make change.

Our goal is to provide you with the basic structure and strategies needed to plan and carry out an effective grassroots public education or advocacy campaign. It's possible to write an entire book on each of the areas covered in this toolkit – in fact, many have been written. But you don't have to read half a dozen books to put together a strong campaign.

What you need to do is establish your goals, create a strategy, make a step-by-step plan, and mobilize the people, partners, and resources to make it all achievable. This toolkit is meant to be a concise guide to accomplishing that. And we include plenty of suggested resources if you want more in-depth information.

The Leadership Conference and The Education Fund provide leadership and coordination to coalition efforts and support the work of national and local partners by providing strategic and technical assistance, preparing materials, offering training, and identifying resources to support coalition efforts. Information on training for grassroots advocacy is provided by The Leadership Conference; information relating to education and coalition building is provided by The Education Fund.

We believe in the power of coalitions to bring people together for a common purpose. History shows that change can be made when diverse voices unite around a shared goal. We hope you will consider us your partners in making needed change happen. You can learn more about our work at [www.civilrights.org](http://www.civilrights.org). You can also reach The Leadership Conference field staff at 202-466-3315 or at [grassroots@civilrights.org](mailto:grassroots@civilrights.org).

Onward!



Ellen Buchman, Vice President, Field Operations  
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# RAISING MONEY

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Fundraising is essential to any campaign. It takes resources to set up information tables at public festivals and events, do mailings, keep volunteers happy with some food and drink—and of course pay for staff and advertising if that is part of campaign strategy. Putting together a campaign plan, and estimating costs for each element of your plan, provides a clearer sense of your fundraising goal.

## Getting Ready

For an effective fundraising effort, you will need:

- A clear statement of the campaign’s purpose (the need it fulfills or the problem it solves);
- Specific and measurable campaign goals and outcomes;
- A well-conceived strategy and plan for reaching goals;
- A reasonably detailed budget for putting the plan into action;
- A detailed plan for approaching funders and enlisting their help; and
- A willingness to ask for money.

Work with members of your own board and fundraising staff, as well as coalition partners and other allies, to put together a campaign budget and fundraising strategy. Identify local foundations, individual philanthropists, labor and civic organizations, and social and political clubs that might be willing to support a well-thought out campaign that can result in real and long-lasting benefits to the community.

## Statement of Need

Foundations, other institutional donors, and major donors may require a statement of need to explain why they are

## TIP:

### Make your case to potential donors

- Identify the human need or social problem you will address.
- Document the need with data or validation from a respected source.
- Explain how the campaign is designed to address the need. Be specific about the outcomes.
- Establish confidence in your campaign’s strategy, expertise, ability to succeed.
- Discuss the beneficiaries of a successful campaign: individuals, communities, the country.
- Identify the resources you need and what you are asking for.
- Make it easy for a donor to give.
- Build on success by cultivating donors for future giving.

being asked to support your campaign. A statement of need describes the problem that needs to be addressed or resolved.

A statement of need could be just a couple of paragraphs. Here’s one example of a very short statement of need from the Foundation Center:

*“Breast cancer kills. But statistics prove that regular check-ups catch most breast cancer in the early stages, reducing the likelihood of death. Hence, a program*

*to encourage preventive check-ups will reduce the risk of death due to breast cancer.”*

### **Concrete Goals & Objectives**

Funders are interested in having measurable ways to evaluate the effectiveness of their giving. Many will require an outline of specific “deliverables” or “metrics” that will be used to evaluate whether and how well you accomplish your goals. For a public education campaign this could include the number of people you plan to reach through various public activities and events, the number of news stories you generate (or approximate audience for them), or the number of individuals who take a specific action. *For more information, see the “Setting Goals” section of this toolkit.*

### **Action Plan**

Show potential funders that you have a strategic plan of action. A campaign plan should spell out the strategy as well as a calendar or timeline of key events or campaign milestones.

### **Budget**

Create a budget based on your campaign plan. Every potential donor has different expectations about budget details, however they generally will want to see that you have thought through the costs of your campaign, including staff time and other direct expenses. Don’t forget to estimate and budget for costs of fundraising itself, which can include printing, postage, staff time, travel, meals with potential donors, and the cost of fundraising receptions or other events. If your budget ends up being bigger than what you think you can reasonably raise, take another look at your campaign plan and figure out where you might trim. But don’t be afraid to ask for what it will take to carry out your campaign.

### **Identifying Potential Donors**

Consider the most likely funding sources.

- Do you have board members or donors who would be able to make a special contribution to this project?
- Remember to enlist as many solicitors and validators as you can. The more people that work with and model your fundraising plan, the more likely you are to succeed.
- Are board members or donors willing to approach their colleagues?
- What other members of the community may be willing to contribute?
- What about local labor unions, political organizations, or other institutions that should have an interest in the outcome of your campaign?

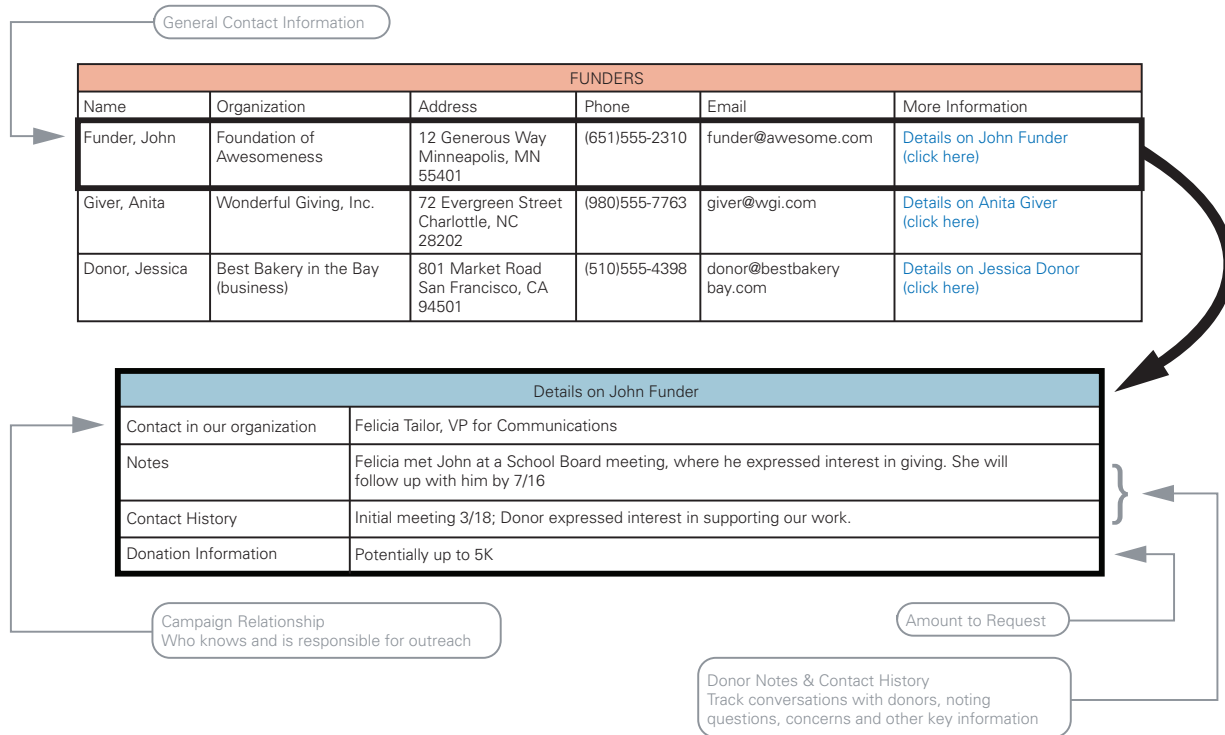
## **Things to consider when budgeting for a campaign:**

- Personnel costs and/or consultant fees
- General office expenses (phone, copier)
- Events (space rental, permit fees, equipment rental, materials, refreshments for volunteers)
- Materials (printing, distribution, and writing and design, if not done in-house)
- Advertising
- Staff and volunteer travel expenses
- Fundraising expenses (printing, mailings, events, meetings with potential donors)
- Website maintenance and management
- Workshops and trainings
- Organizational development support
- Travel
- Translations and interpretation services
- Lease and venue rental
- Equipment
- Office maintenance
- Media
- Evaluation and monitoring

- Are there churches or other religious congregations with community-focused funding who will see your campaign as fulfilling part of their social justice mission?
- Are there local foundations that focus on the well-being of your state, city, or community?
- What kind of fundraising events could you hold?
- Who can you reach by e-mail, Facebook, or other social networks to ask for financial support?

Create a spreadsheet of potential donors, beginning with those closest to you, such as board members and the organizations they represent. Give yourself a place to note donors’ interests and activities so you can acknowledge and connect with things that are important to them. Keep

## keeping track of donors: sample spreadsheet



Be sure to also include a **record of donations pledged and received**, and a column to record your **thanks and follow-up** communications with the donor

### TIP: Taking Care of Donors

People who have given to your campaign are your most likely source of additional support as long as you make them feel appreciated and connected. Here are a few tips:

- Thank donors personally and promptly. Hand written notes and thank-you calls can make a strong impression.
- Find ways to recognize their support publicly at events or on campaign materials.
- Keep them connected with campaign updates and invitations to campaign events. Email is a low-cost way to stay in touch.
- Ask for their ideas, input, and participation as well as their financial support.

track of who on your team is responsible for contacting each donor, and what kind of response they get.

Broaden your initial list by asking board members and fellow activists to open the door by introducing you to their friends and contacts. Some donors may give because they share the goals of the campaign; others may give primarily based on their relationship with the person asking. Don't be shy about casting a wide net. It never hurts to ask—the worst thing that can happen is that someone says “no.”

Keep in mind that institutional funders, such as community foundations, may have a specific timetable for considering funding requests and a long lead time in making grants. Tailor your fundraising letter and other materials to meet their requirements.

#### **Know Your Donors**

The more you know about potential donors, the more you can make a connection between their interests and your campaign, and the better you'll be able to secure your donation.

The best chance of success in securing donations is an in-person meeting. Next best is over the phone. Direct

## food for thought from a veteran fundraiser

### Why People Give

- They want to.
- They are asked to by other people.
- They see their gifts as opportunities.
- They believe in the organization and its mission.
- They believe the organization can meet the community's needs.
- They are involved in the organization.
- They want public recognition.
- They want tax benefits.

### Why They Don't

- The wrong person asked.
- The case wasn't strong enough.
- The appeal wasn't personal enough.
- No one suggested a specific amount.
- No one suggested alternative ways of giving.
- No one followed up.

mail, or online, even if compelling, will yield smaller contributions or fewer responses. All strategies are necessary. Keep in mind that knowing your donors makes all of these successful strategies easier.

Come up with an appropriate request. Some people may be able to give \$1,000 while others may have to stretch to give you \$10. When you put together your donor list, try to determine what level of giving is possible for people. You should know the giving history of your own board members and donors. A little research on foundations, other institutions, or prominent members of the community can guide you in setting targets.

### ***Write a Fundraising Letter***

Write a letter that you can send to potential donors. Use a personal tone and a direct style. Explain how a donor's support for your campaign will make a difference in your community or for the causes the donor cares about. For smaller donors, ask for a specific amount of money. For potential major donors, ask for the opportunity to talk with the donor in person or by phone.

### ***Fundraising Events***

Fundraising events, such as a reception, luncheon, car wash, block party, music festival or auction, can build energy and showcase the campaign for a lot of people at once. But events can take a lot of time and energy to pull off, and many campaign managers find that they are not the most cost-effective way to raise money. If you have a good track record with events, or if your community has a habit of turning out for them, make them part of your campaign plan. But consider your time as well as how you'll cover costs and make money.

### ***Online Fundraising***

New media and social media sites offer other possibilities for building your base of supporters. *See the "Using Social Media" section of the toolkit for more information.*

### ***Develop Your Elevator Speech***

Know your stuff. Before you start talking to potential donors, practice making a quick and effective case for supporting your campaign until it comes naturally. Some people call this the "elevator speech"—a way to make your case in the few moments you might have their undivided attention. Think of it as a more conversational version of your written mission statement. Be sure to have some personal stories about people who are affected by the problem your campaign is addressing that you can weave into a longer conversation.

### ***The Ask***

Start a personal conversation by thanking your potential donor for their time and interest. Make your case and answer any questions. Ask unapologetically for a specific amount and don't be afraid to sit in silence while the donor considers your request. Be a good listener. The donor is likely to identify his or her personal interests that identify areas of common ground with your campaign.

### ***Follow Up***

After you have finished a meeting or phone call, jot down some notes about your conversation. Did they have questions you couldn't answer? Did you offer to send any specific information? You can use these notes to personalize your thank-you note and develop a stronger relationship over time.

### Additional Resources

- The Foundation Center offers free online tutorials and training courses in budgeting, proposal writing, and other topics, and sells books and other resources: <http://www.foundationcenter.org>.
- You can find information and advice about putting together a fundraising plan, writing good fundraising letters, and maintaining relationships with donors here: [http://nonprofit.about.com/od/fundraising/Fundraising\\_Tips\\_and\\_Tools.htm](http://nonprofit.about.com/od/fundraising/Fundraising_Tips_and_Tools.htm).
- The National Committee for Responsive Philanthropy and the Center for Community Change produced this advice on fundraising for community organizers: <http://www.ncrp.org/files/publications/seizingthemoment.pdf>.

### “Encouraging Words”

Don't be afraid or ashamed to ask for money. You believe in what you're doing and people will respond if you let your passion come through. Don't be discouraged if some people don't respond right away, or can't give at the moment. Asking for money gets easier with practice. The more people you ask, the more will give.