



The Leadership
Conference
Education Fund

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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.



The Leadership
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Dear Friend:

This toolkit was put together 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 smart 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 on Civil and Human Rights and The Leadership Conference 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 <http://www.civilrights.org>. You can also reach The Leadership Conference field staff at 202-466-3315 or at grassroots@civilrights.org.

Have fun!

Ellen Buchman
Vice President, Field Operations
The Leadership Conference on Civil and Human Rights
The Leadership Conference Education Fund



The Leadership Conference on Civil and Human Rights Field Department

The Leadership Conference on Civil and Human Rights Field Department (the field team) provides grassroots consultation, advocacy coordination, support, and assistance to national, state, and local organizations regarding field campaigns around important civil and human rights issues. The team is based in Washington, D.C., with a satellite office in Atlanta, Georgia.

Overview of National, State, and Local Work

Nationally, the field team convenes and provides field outreach and guidance to the coalition's more than 200 national civil and human rights organizations on a broad range of issues. With that focus, the field team provides field outreach and advocacy, and public education campaign guidance, on a broad range of issues.

For example, through national coalition efforts, the field team has played a role in implementation of field campaigns for legislative victories, including: the Americans with Disabilities Act Amendments Act of 2008, the Lilly Ledbetter Fair Pay Act of 2009, the Matthew Shepard and James Byrd, Jr. Hate Crimes Prevention Act of 2009, and the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010.

Further, when resources permit, the field team works in collaboration with local organizations to conduct national direct-service, public outreach campaigns such as the Digital Television Transition (DTV) campaign or the 2010 Census education campaign.

The field team also works throughout the country with local organizations to provide assistance and support to local coalitions' work in their communities. This support includes field outreach and advocacy,

and public education campaign guidance. The team collaborates with leaders in states including: Arizona, Colorado, Georgia, Maine, Mississippi, Nebraska, Pennsylvania and Texas. As just one example, in Nebraska, the field team has worked with coalitions to preserve equal opportunity, as well as judicial nominations and immigration reform education.

In concert with The Leadership Conference's policy and communications departments, the field team works proactively to create rapid response mechanisms on important federal civil and human rights issues with national coalitions in Washington D.C., and state and local coalitions in key states.

Support Provided to National and State Coalition Members

The field department is proud to offer an array of services to both national and local partners to help support their work. These services include:

- Strategic Campaign Development, Guidance, and Execution (when applicable)
- Webinars, National Conference Calls, and Legislative Updates
- Legislative Email Action Alerts
- Trainings and Workshops on Coalition-Building, Community Outreach, Grassroots Advocacy, and Key Civil and Human Rights Issues
- Media Readiness Training (in conjunction with the Communications Department)
- Educational Material Development, Grassroots Toolkit, Resource Guides, and Fact Sheets
- Support in Organizing Press Briefings, Lobby Days, and Coalition Convenings



RAISING MONEY

Fundraising is essential to any campaign. No matter how much passion and energy you have, or how motivated your volunteers are, a campaign will need some money for expenses ranging from printing and distributing educational materials, to organizing and publicizing events. 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 your campaign strategy. Putting together a campaign plan, and estimating costs for each element of your plan, will give you a clearer sense of your fundraising goal.

Getting Ready

For an effective fundraising effort, you will need:

- A clear statement of your campaign’s purpose (the need it fulfills or the problem it solves);
- Specific and measurable campaign goals;
- A well-conceived strategy and plan for reaching your goals;
- A reasonably detailed budget for putting your 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 your 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 your community.

Statement of Need

Foundations, other institutional donors, and major donors may require a statement of need to explain why they are being asked to support your campaign. It describes the problem you are trying to resolve or the need you are trying to address. It should be concise, include specific facts that document the nature or extent of the problem, and show how your campaign can be the solution.

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.”



**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.*
- *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.*

Concrete Goals & Objectives

Funders are increasingly interested in having measurable ways to evaluate the effectiveness of their funding. Many of them will require you to outline 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, such as signing a public statement or sending an email to a public official. *For more information, see the “Setting Goals” section of this toolkit.*

Action Plan

In addition to making the case for the necessity and value of the campaign, and stating your goals clearly, it is important to show potential funders that you have a strategic plan of action. Your campaign plan should spell out your strategy (planning, coalition or partnership development, volunteer recruitment and training, outreach activities, communication plan) as well as a calendar or timeline of key events or campaign milestones. *See the “Developing Strategy” section of this toolkit for more information.*

Budget

You will need to 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. And 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

Once you have a budget, consider your most likely funding sources.

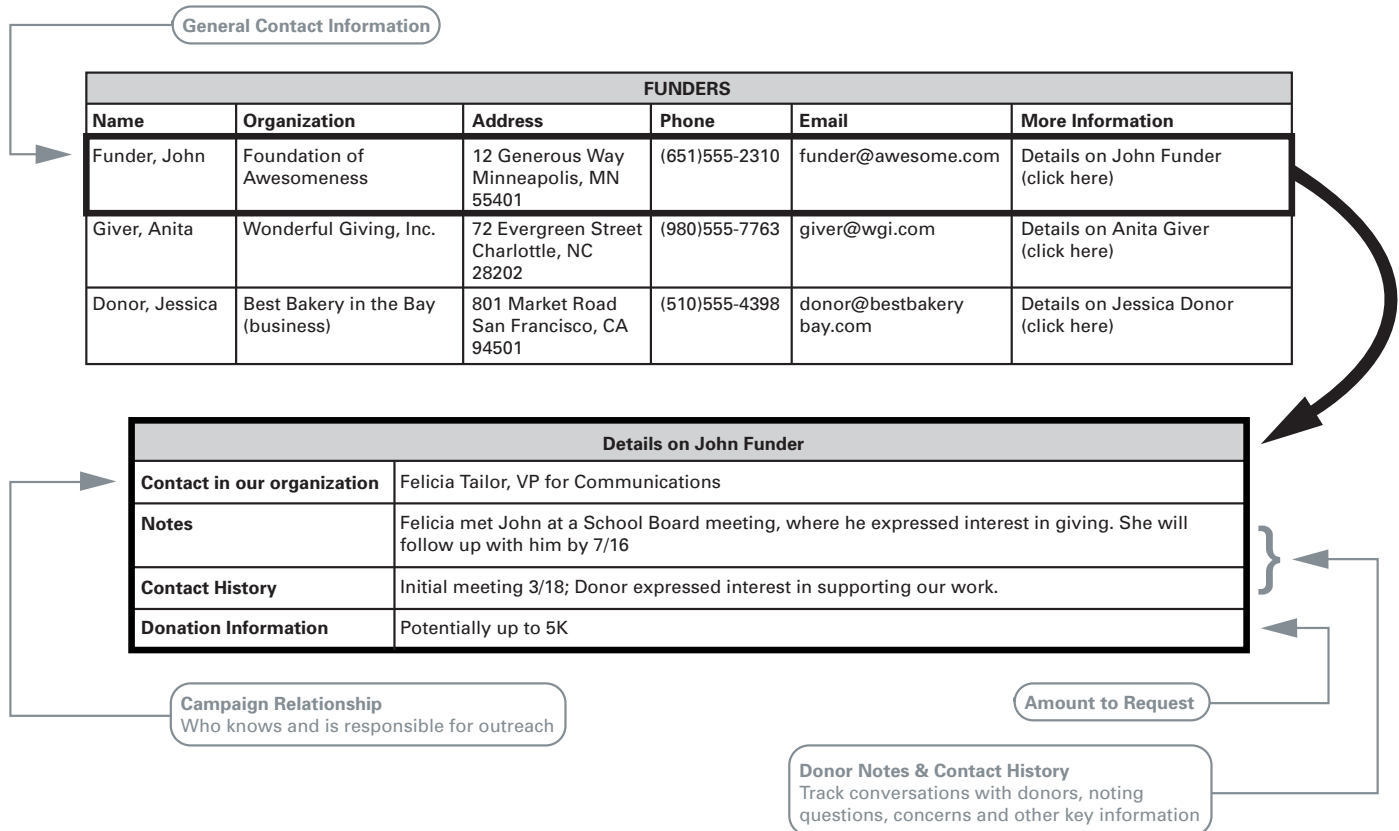
- Do you have board members or donors who would be able to make a special contribution to this project?

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 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?
- 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?

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

- 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 donor's interests and activities so you can acknowledge and connect with things that are important to them. Keep track of who on your team is responsible for contacting each donor, and what kind of response they get.

Continue to broaden your initial list by asking board members and fellow activists to share their contacts with you—and 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. And you'll need to 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

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.

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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 should 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 potentially major donors, ask for the opportunity to talk with the donor in person or by phone.

Develop Your Elevator Speech

Know your stuff. Before you start talking to potential donors in person or on the phone, 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.

Follow Up

After you have finished a meeting or phone call, jot down some notes about your conversation. Is their daughter getting married? Is their car giving them trouble? 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.

Fundraising Events

Fundraising events, such as a reception, luncheon, car wash, block party, music festival or auction, can be great ways to 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 be sure to consider your time and how you'll cover costs and make money.

Online Fundraising

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

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
- 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>



for 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.*

“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.

