

Breaking Barriers to Effective Giving

In learning any new skill, there are moments of frustration and feelings of ineptitude. The following handful of suggestions for overcoming these barriers and pushing through to the next level of inspired philanthropy summarize many of the key points in the book.

As with any activity—from sticking with an exercise program to learning a new language—things get in the way of our learning or growth, or our early determination gives way to frustrations that can allow us to get off track and never get back. We don’t want that to happen with you and your desire to be more effective in your giving, so we present here the major barriers many encounter as they begin to organize their giving, along with some solutions for you to try. Specific organizations and networks referred to can all be found in Appendix I, “Resources.”

We have identified three major barriers to effective giving:

- *Informational*: lack of information about organizations and activities you might get involved in
- *Emotional*: lack of confidence as a donor, volunteer, or activist
- *Strategic*: lack of the time, focus, or support that would help you push through the other barriers

INFORMATIONAL BARRIERS

How do I find out which organizations do the things I'm interested in supporting? What roles are possible for me to play? Where do different organizations fit into the picture of making social change?

Solutions to Informational Barriers

Appendix I contains a wealth of information about networks and collaborating associations that can lead you to more information about who is doing what in the nonprofit world. In addition, you might

1. Attend issue-oriented conferences or panels. Collaborating organizations such as the Women's Funding Network, the Children's Defense Fund, the American Association of Retired Persons, and the NAACP all have annual conferences at which you can learn more about the status of issues, strategies, and solutions. Look in the newspaper for national or regional conferences, issue-oriented alumnae gatherings, or briefings that may be coming to your area.
2. Read the annual reports distributed by community foundations, the United Way, alternative federations, private foundations, and the community groups these organizations fund or that you read about in the newspaper or hear about from friends. You may get annual reports or lists of grantees by calling agencies or foundations directly and requesting them or by visiting the library or Foundation Center in your region.
3. Subscribe to and read publications that cover news in the nonprofit world, such as *The Nonprofit Times* or *The Chronicle of Philanthropy*.
4. Attend the issue briefings or workshops periodically offered by nonprofit training and research organizations and funders' associations, such as the National Network of Grantmakers or The Philanthropy Roundtable, or affinity groups of givers, such as Native Americans in Philanthropy. The Council on Foundations (see "Resources") can refer you to specific member-affinity groups.
5. Attend fundraising events to become familiar with the people who work and volunteer for an organization and to learn more about the community they represent.
6. Ask friends, family, and colleagues which organizations they support.

7. Volunteer for different organizations. You can agree to volunteer for an organization for short or longer commitments. Be honest with the organization and tell members that you're seeking to find out more about the organization by helping them for a few hours a week over an agreed-upon number of months.
8. If you're a donor who is considering giving away more than \$5,000 a year and would like the benefit of meeting with other donors to consider issues or strategies, or if you would like to consider the power of collective giving, you might want to join a donor network. Regional associations of grant-makers (RAGS) also have periodic programs for major donors giving \$5,000 or more. In the 1990s, a multimillion-dollar initiative called New Ventures in Philanthropy created many new donor education programs across the United States to promote and expand giving. The Council on Foundations and educational organizations such as Inspired Legacies, The Philanthropic Initiative, Resource Generation, the Third Wave Foundation, Changemakers, the Council on Foundation's Family Foundation program, The National Center for Family Philanthropy, and the Association of Small Foundations (all listed in "Resources") have meetings for major and family donors who give significant amounts. Call organizations that sponsor donor forums and ask them for their criteria for attendance and a copy of their publication list and meeting descriptions.
9. Write, call, or visit (call first) executive directors or development directors of organizations you care about and ask what's needed, how you might help, or what they perceive is a core or strategic funding or volunteer need. Most often agencies need operating income (to pay salaries, rent, lights, phone, and printing) before they need money to launch a new program. Foundations historically have preferred to fund programs instead of operating expenses, so your support of the "annual fund" or core operating expenses not covered by grants really means a lot to groups.

EMOTIONAL BARRIERS

What exactly is my role as a donor, volunteer, or activist? What skills do I need to have or should I learn to fulfill this role? How can I become more comfortable with the idea of giving away what are, for me, large amounts of money? What if my

friends discover I have significantly more than they do? How can I decide what is an appropriate amount to give?

Solutions to Emotional Barriers

1. Contact The 50 Percent League or Inspired Legacies for referrals to money therapists or family facilitators.
2. Ask friends if they know of anyone who would be a good “money mentor” or teacher.
3. Conduct informational interviews with other donors who are nonprofit leaders to learn how they organize and manage their active lives. Some questions to ask include the following. How do you manage the organizing aspects of being a donor, such as what materials to keep on an organization’s needs, budgets, and contact you’ve had with them? How have you handled requests from your friends? What personal issues about money, influence, and power have come up for you as a donor or fundraiser, and how do you handle the innate inequities in philanthropy between giver and fundraiser? What has helped you stay hopeful amidst the enormous task of addressing community imbalances?

STRATEGIC BARRIERS

How can I limit my involvement in things I’m not really that passionate about?
How can I feel less isolated about how I am planning and doing my giving?

Solutions to Strategic Barriers

1. Review the values you identified in Exercise 2.3 in Chapter Two. If your current activities are not connected to your top values or priorities, decide whether you want to graciously extricate yourself from them and seek activities more in line with your priorities.
2. Consider limiting your time commitments. Experiment with allocating a specific time commitment—for example one day a week, month, or year—to your vocation or avocation as a donor or donor activist.
3. Practice refraining from responding to every funding request on the spot. When you receive requests in person, let people know that you’ll give the re-

quest careful consideration in light of your priorities. When you receive requests in the mail, consider them in light of all the other requests you've received in a given time period and in relation to your giving plan.

4. Join a donor network (see #8 under "Informational Barriers"). If you want to work in community there are lots of networks from which to choose. It can be fantastic to have a dream, create an initiative, and have other donors or activists join you. For some, it's too complicated a process. For others, it's a way to ensure accountability, fun, and others' involvement. See Chapter Eight for some examples of collaborative funding projects.
5. Be attuned to and reflect on the working style that is most comfortable for you. Some people prefer to work alone, while others feel they get better and more diverse information by connecting with others. Some donors love to create collaborative projects, others prefer to work anonymously.
6. Some donors really do have a mission statement, a personal action plan, and a budget, and are clear about their priorities. Most are not so thoroughly organized. There are pluses and minuses to even the best of plans. After all that we have said about creating a mission statement and a giving plan, we do recognize and honor those donors who don't want to be as organized or analytical as we propose. Whatever your style, claim it as yours while being open to what others are trying.