



THE HUMANE SOCIETY  
OF THE UNITED STATES



Pets for Life

# SUSTAINABILITY GUIDE



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# INTRODUCTION

When Pets for Life (PFL) first began there was a clear understanding that people living in poverty or in underserved communities were faced with daily challenges and extreme barriers to accessing services for their pets. We didn't have all of the data yet to showcase the disparity or fully recognize how deep the divide is between the field of animal welfare and tens of millions of pet owners. But the longer we operated the PFL program through our own direct care and the more work we did with local groups from around the country, we realized the immense need to not only inform ourselves on the history and current state of larger systemic and institutional issues but become an active participant in dismantling structural inequity, starting with our own industry.

In this effort we have learned significant lessons on how to reach and be of service to people living in poverty; we've also learned that while socio-economic disparities are immense, race matters in conjunction with and in addition to poverty. While these lessons are important in creating and implementing programs, they are just as central to how we message and fundraise for the work. In fact, we have seen that it's possible to run a community outreach program without a full understanding of race and poverty, but it's much more difficult to fundraise successfully for that program without a decent level of awareness and knowledge on these issues. So while it may seem unnecessary at first to become more fluent in and informed on racial and economic inequity, we ask you to give us the benefit of the doubt and stick with us through the process of this guide. We are confident that what we have created will get you where you wanted to be when first opening this guide – a more effective and fruitful place in fundraising for and sustaining your PFL work.

Throughout this guide when referencing the PFL approach, we mean addressing the inequity in and lack of access to pet resources that people in underserved areas experience. This includes providing services through direct care programming but also making a philosophical shift as a field and working to change systems of oppression, discrimination and bias.



## *Definition of Sustainability*

In the context of the Pets for Life program and this Sustainability Guide, sustainability is defined as:

- Full adoption of the PFL approach as both a conceptual and practical framework for achieving an organization's mission, including a genuine understanding of how animal welfare is connected to larger systemic challenges for people and pets
- Organizational leadership and ownership in integrating and upholding the PFL approach in all aspects of its operations and programming
- Access to funding (new or existing sources) to support the program

In the nonprofit world, organizations have to be resourceful because there never seems to be enough funding to do the great work they are doing. Understandably, many organizations start with the last point on our definition of sustainability: How can I access more money to support my program? Our perspective is that in order to gain access to additional funding, the other two parts of this definition need to be answered first. Has your organization adopted the PFL approach not only conceptually (the easier part) but also practically? Is it integrated into the other programs and services of the organization? And if you can answer yes to those questions, the next question is just as important: Has the leadership of the organization taken responsibility for upholding the PFL approach in its operations and programming? For example, is community support work as important to the leadership of the organization as it is to the staff who are managing the actual outreach efforts?

When organizations are intentional in their support of the PFL program as a whole, and are committed to the approach, funding will more easily flow from that vision and commitment. Now of course, there are practical elements that can help organizations fundraise better, and this guide includes some of those basic principles. But each organization may have a different strategy in identifying which sources of funding will best support the program, and which networks will provide the most return on investment. Each chapter of this guide is connected to this definition of sustainability for the purpose of increasing your holistic sustainability of the PFL Program.

# HOW TO USE THIS GUIDE

**The Sustainability Guide is organized into four color-coded CHAPTERS:**

DESIGNING FOR SUCCESS

DEEPENING THE CONNECTION

EFFECTIVE MARKETING AND COMMUNICATIONS

EFFECTIVE FUNDRAISING



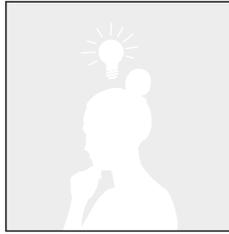
Each chapter starts with an *Overview* and *Keep in Mind* reading to help set the context for why the chapter is crucial to your understanding and implementation of sustainability.

**Look for the reminder icon.**

Each chapter is then divided into **SECTIONS** and **SUB-SECTIONS** to help guide you through the content, check for understanding, and encourage practical application.

**Each sub-section includes the following components:**

1. Core content
2. Response (a quick individual activity or reflection to check for understanding)
3. Initial Implementation Step (an extended individual or group activity to move towards application of what has been learned)

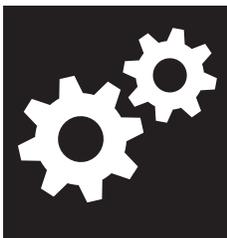


## *Response*

**Look for the gray response section with the thinking person icon.**

When you encounter a Response area, consider your mindset in engaging with the content. Here are some suggestions on how to approach both the content and your response to the content:

- **Be Present**
  - Silence internal chatter
  - Listen actively when discussing with others
- **Create Community**
  - Consider how the content you are learning will impact the community around you – not only your colleagues, but additionally the underserved neighborhoods you serve or want to serve
  - Think about how you might draw others into this learning journey in order for it to provide rich content learning from differing perspectives
- **Embrace Discomfort**
  - Take risks, be curious and ask for clarification when engaging in discussion with others
  - Don't give up when you disagree or don't understand
  - Assume good intent and take responsibility for impact
  - Acknowledge unequal risks and burdens in conversing about poverty and race – usually it is more difficult to share when you have been personally impacted by these matters
  - Expect and accept lack of closure, there are no quick fixes when discussing these topics



## *Initial Implementation Steps*

**Look for the gear icon.**

For some of the initial implementation steps, we recommend you engage in group discussions, as these will help you to process the learnings with others, raise any challenges you experience with the content, and increase accountability for any new actions you would like to take forward.

To position your small group discussions for success, we encourage you to start by establishing group agreements, such as make space/take space, one person at a time, and hold confidentiality. The purpose of group agreements is to create an open and respectful environment in which groups can work together creatively and individuals feel safe, sharing their ideas and opinions.

# CHAPTER 1:

# Designing for Success

## *Overview*

---

This chapter looks at the need for a full adoption of the PFL approach within an organization - both conceptually and practically. It also considers how organizational leadership plays a critical role in integrating and upholding the PFL approach in other aspects of operations and programming - setting the stage for what a successful PFL program looks like. Although this is the shortest chapter within the guide, it is just as important as the others since it provides the groundwork for a truly sustainable program. There is one section included:

### **Organizational Commitment**

- A. How to integrate PFL into your mission
- B. My part in the work

## *Keep in Mind*

Every organization is different. Depending on whether your organization is an open or limited admission shelter, a municipal or private entity, a spay/neuter or community medicine clinic or even all volunteer run, your experience in receiving and processing the information in this chapter will vary. However, regardless of what type of organization you represent or where in the journey of PFL your organization currently is, there is progress to be made and benefits to be gained by taking the time to absorb these strategies.





# ORGANIZATIONAL COMMITMENT

## *A. How to integrate PFL into your mission*

Consider your organization's mission. A mission statement should include three main things:

- The change the organization wants to see in the world
- For whom it wants to see that change (focus population, which should be grounded in the demands of your community's needs and circumstances)
- The overarching strategy of how to get there

Since a mission statement focuses and guides the work of your organization, it is important to consider how PFL aligns with that mission. This will be dependent on your organization's mission and the change you want to see. But if the PFL approach can be an integral part of that change, it will be easier to connect the program's purpose to colleagues who are not directly involved.

As stated in the introduction, the PFL approach is to address the inequity in and lack of access to pet resources that people in underserved areas experience. This includes providing services through direct care programming but also making a philosophical shift as a field and changing systems of oppression, discrimination and bias. Some organizations in the animal welfare field haven't yet considered the systems of oppression, discrimination and bias that exist. Therefore, it can be helpful to connect the change an organization wants to see with the inequity and lack of access that exists in the community the organization is serving.

## Response

Write out your organizational mission. As you consider the ‘*why*’ for your organization’s existence, what resonates most with you about the change you want to make?

Why is PFL central to your mission? If PFL does not seem to be central to your mission, consider the following:

- What elements of the PFL program enhance the other services your organization provides?
- What are some next steps for you in making the case for PFL?
- What are the potential drawbacks to your organization and the community if you do not have a program like PFL?



## Initial Implementation Steps

Build a mission-focused case for the PFL approach by answering the following questions related to different areas of your organization.

IMPACT	OUTREACH	PROGRAM OUTCOMES	DECISION-MAKING
How do you define success at the highest level? How does the PFL approach impact these outcomes?	Who comes to your program? What racial and/or economic disparities do you observe?	What are participant outcomes (e.g., retention/satisfaction) like? What racial and/or economic disparities do you observe?	What does your board, leadership team, and staff look like? Who holds power? How does it matter?



## B. My part in the work

The success of any organization hinges not only on the effectiveness and commitment of a single individual, but rather the collective efforts of multiple individuals consistently delivering on their part of advancing the organization's mission. Therefore, when considering the sustainability of the PFL program, it is vital for you to think about other key internal stakeholders beyond those directly involved in the program. Below are some key functions within your organization and the specific roles they can play in strengthening the PFL program.

### Chief Executive Officer or Executive Director

- Promote the organization's vision and mission, and build support for the PFL program within and outside of the organization
- Lead, motivate and inspire team to achieve the organization's mission
- Ensure that programs are in alignment with organization's values, vision and mission, including its commitment to the PFL approach

### Development Staff

- Oversee development and fundraising efforts with an eye towards diversifying the funding streams that support the PFL program
- Cultivate and maintain relationships with donors and funders
- In partnership with program staff, craft messaging and communications to different target audiences

### Program Staff

- Build support for the PFL program within and outside of the organization
- Educate staff on the successes of the PFL program as well as the emerging needs and opportunities within the community that it serves
- Ensure the quality of the PFL program and the organization's ability to effectively respond to the needs of the community that it serves

In addition to the roles above, there may be other staff within your organization that play a key role in supporting the PFL program, such as the finance and budget team, receptionist, and veterinarians. What is essential to remember is that a critical ingredient to sustainability is the collective buy-in and commitment to advancing the PFL approach both within and outside of your organization.



## Response

Consider your role and responsibilities to answer the following questions.

- How are you currently supporting the PFL program?
- What are ways in which you can deepen your support of the PFL program?
- What support or resources do you need to be a more effective supporter of the PFL work?



## Initial Implementation Steps

Gather a group of colleagues that represent different departments and perspectives across your organization. Complete the worksheet below individually and discuss your responses as a group. In the discussion, consider the question:

**“How does my role advance the PFL approach in each of these areas?”**

IMPACT	OUTREACH	PROGRAM OUTCOMES	DECISION-MAKING
How do you define success at the highest level? How does the PFL approach impact these outcomes?	Who comes to your program? What racial and/or economic disparities do you observe?	What are participant outcomes (e.g., retention/satisfaction) like? What racial and/or economic disparities do you observe?	What does your board, leadership team, and staff look like? Who holds power? How does it matter?



# CHAPTER 2:

# Deepening the Connection

## *Overview*

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This chapter looks at both understanding and deepening the connections between social, racial, and economic justice and animal welfare work. PFL is centered on increasing equity in and access to pet resources most frequently through community outreach and the provision of free services to those who are most underserved. The conceptual framework behind this approach can often be difficult for people to adopt, particularly people with varying levels of privilege. This chapter helps to clarify and deepen the connection for people wherever they are in their adoption of the conceptual framework, and it provides a common language for discussion around these concepts. There are three sections included:

### **Cultural Awareness and Humility**

- A. How to practice objectivity
- B. How to uncover and overcome biases
- C. How to acknowledge and appreciate differences
- D. The importance of empathy

### **Why Does Racial Equity Matter?**

- A. Understanding race and equity
- B. How race intersects with the animal welfare field

### **Assessment of Self and the Organization**

- A. Your identity through the lens of race
- B. How to assess your readiness to engage in racial equity work
- C. How to assess your organization's readiness to engage in racial equity work

## *Keep in Mind*

This chapter looks at both understanding and deepening the connections between systemic and institutional issues and the field of animal welfare. It will give you the space to reflect and explore what an explicit, intentional organizational commitment to increasing social, racial, and economic justice may look like in your work. Each of these aspects of justice are unique in and of themselves and are also interrelated in the field. Statistics show that economic outcomes are significantly impacted by race, as well as social dynamics for those who are most marginalized (based on non-dominant religion, sexual orientation, gender identities, ability status, etc.). It is impossible therefore to address poverty and inequality without talking explicitly about race in the United States. The realm of animal welfare in particular needs to consider how their organizations reflect the full community in order to be responsive to all audiences of pet owners and make the most meaningful change.





## CULTURAL AWARENESS AND HUMILITY

### *A. How to practice objectivity*

First, let's take some time to define objectivity and subjectivity.

- Objectivity is focusing on facts, refraining from assumptions.
- In contrast, subjectivity is looking at things from your own point of view, potentially letting personal bias skew or distort the facts.

We all make assumptions in our lives. It's impossible not to because our unique environments and experiences shape the way we view things. When we hold back our assumptions, we are able to be more objective. We are looking at facts, like an investigator. With subjectivity, we may be looking at the facts, but our biases may affect how we interpret the facts.

In order to decrease our subjectivity and increase our objectivity, we need to take a closer look at bias, and how our biases may affect our understanding of a situation.

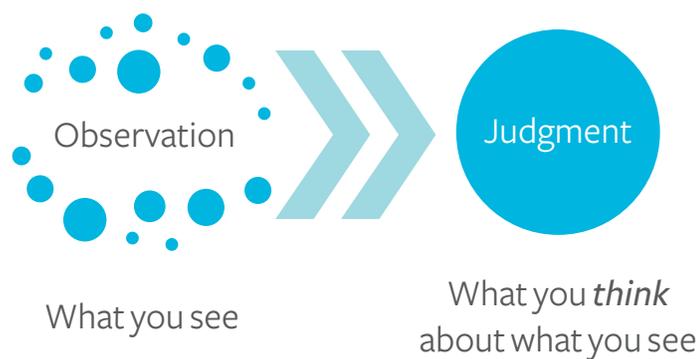
Watch this video before continuing: [www.tinyurl.com/3G3Q2JD](http://www.tinyurl.com/3G3Q2JD)



Did you get the right number of passes? Did you see the moonwalking bear the first time you watched it?

At the end of the video, the tagline said, “It’s easy to miss what we’re not looking for.” This is an example of bias. This video shows that the question we ask determines what we see and hear and the answer we get.

Let’s talk more about how to be objective. Objectivity starts with observation.



The questions we ask determine what we see and hear. When you observe, you are looking at all the different facts and taking note of them, similar to the many bubbles we see around the word “observation.” However, it’s important to pay attention to whether you are making a judgment rather than an observation. An observation is what you see, rather than what you think about what you see. When you start to make assumptions or conclusions about your observations, you are likely making a judgment and are more prone to apply subjectivity.

For example, instead of asking why someone would have a dog if they are just going to leave him chained up outside, some alternative questions to ask could be:

- Does the person rent his or her home?
- How many people live in the home?
- Are there behavior issues with the dog?
- Is there a fence that needs repair?
- Does someone in the family have allergies to dogs?
- Is the dog only outside while the person is at work?

Asking questions that allow you to listen and learn will provide the opportunity to get to know someone and offer support if and when appropriate or invited to do so.



Objective observation is so important because it helps us to see more than what we saw at first glance. It will help us to not jump to judgment and instead assess a situation objectively and accurately. Additionally, it will challenge us to think outside of the box. For example, we may think that our way of seeing things is better, but we can challenge our thinking to consider whether it is just different or based on our personal context. There are often other ways of seeing or doing things that can still include love and care for a pet.

Consider a tethered dog. More times than not, dogs are tethered because of love and concern - someone wants to keep his or her dog safe from running loose or being picked up by animal control, the dog isn't allowed indoors due to rental restrictions but the family doesn't want to lose the dog, the dog is being kept temporarily for a friend or family member, and many more reasons that have nothing to do with negative intentions or lack of care.

Objective observation is choosing not to make judgments about what is underneath the surface. Anyone you interact with will likely do things differently than you, especially if they grew up differently than you. When this is the case, take note of all you observe. If it causes you to question the person, check your observation with your colleagues before jumping to a conclusion.



There are a few strategies that you can implement to increase your objective observation:

- 1.** Uncover and acknowledge your biases or implicit associations
- 2.** Minimize the effect of your biases

The next section does a deep dive into these strategies.

## Response



The image above was created as part of a World Wildlife Fund campaign about the impacts of deforestation. Test your observation skills. How many animals can you see in this picture? Even when observing the same image, people might see it differently. Observation is looking at something again and again in order to make sure we see it accurately.

- How is this exercise relevant to your work?
- What is the benefit of repeatedly looking closely at the same situation?

*A higher resolution version of this image is available online by searching "WWF Botanimal"*



## Initial Implementation Steps

- Discuss with your colleagues the observations you have made about the community you are serving.
- Notice what observations you make. Do these observations focus on deficits or strengths?
- The next time you visit a community member, make additional observations – consider the strengths that these community members may have. What additional observations can you make from intentionally considering your observations from a strengths-based perspective?



*Key to the image above.*

## B. How to uncover and overcome biases

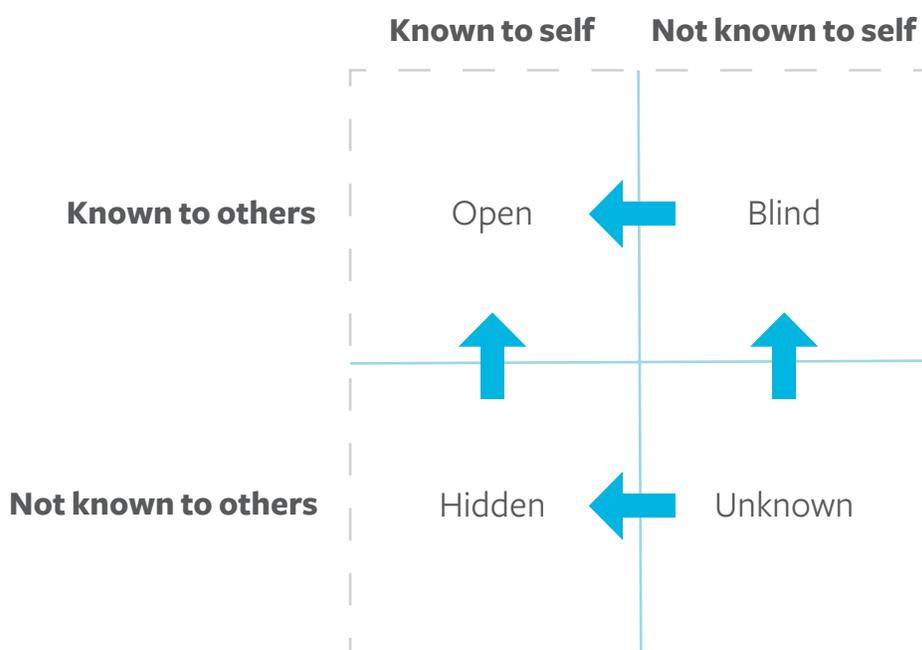
In order to be objective (i.e., free from your own bias), you must first figure out what biases you have. The previous section's basketball video meant to test your awareness gave a perfect example of bias – when you are told to look for one thing, you don't see anything else because you are biased toward the thing for which you are looking. Here are some steps to increasing objective observation.

1. First, uncover and acknowledge your biases. Some biases need to be uncovered because you may not be aware of them. These are called implicit associations. We will give you an activity at the end of this section to uncover your own potential implicit biases. Other biases are explicit or intentional. Whether you have an implicit or explicit bias, it is key to acknowledge the impact of these biases on the way you think and make decisions about others around you.
2. Finally, once you have explored your biases, you can take steps to minimize your bias based on what bias you have.

### STRATEGY 1: UNCOVER AND ACKNOWLEDGE BIASES

#### The Johari Window

One framework we can use to help us understand more about bias and identify areas of self awareness is called the Johari Window.



The Johari Window basically looks at things that are known and unknown to self and how these are known and unknown to others. Let's look at the Johari Window in the context of biases.

- A bias that is not known to others and not known to self would be in the **UNKNOWN** quadrant.
- A bias that is not known to others but known to self would be in the **HIDDEN** quadrant.
- A bias that is known to others but not known to self would be in the **BLIND** quadrant.
- And finally, a bias that is known to others and known to self would be in the **OPEN** quadrant.

Biases can move within the quadrants in the direction of the arrows here. Let's look at an example on the following page to make this a little more clear.



*Example:*

Imagine a woman who has lived in New York City all her life, who has a bias toward New York City being the best city in the world. This bias is unknown to her because she has had very limited exposure to other cities in the world. She starts talking to a man from Denver, Colorado who believes that Denver is better than New York City because he thinks that being closer to nature is better than being surrounded by buildings.

At this point, if she recognizes that she has a bias different from this man from Denver, her unknown bias moves from unknown to hidden. She can decide whether or not to tell this man about her bias. If she does, the bias would move from hidden to open.

However, she may think this man is ridiculous and try to convince him of all the reasons why New York City is better than Denver. In this case, because of her judgment made on the man from Denver, it is likely that her bias is still unknown to her. The man is starting to see the woman's bias toward New York City, but she hasn't recognized it yet. This bias has moved from unknown to blind because it is obvious (or known) to others but is not known to self.

If the man decides to explain to the woman why this is a bias, it is likely that the bias can move from blind to open.

In summary:

- When we uncover implicit bias, that information moves from **UNKNOWN** to **HIDDEN**.
- When we choose to share that information with others, it moves from **HIDDEN** to **OPEN**.
- When someone shares feedback with us, we can experience information moving from **BLIND** to **OPEN**.





## TYPES OF DECISION-MAKING BIASES

In order to acknowledge bias, it is important to understand the different types of bias which may distort our perception. Below you will find three different types of decision-making biases and how they may distort our perception.

DECISION BIAS	DISTORTION
<b>Anchoring Bias</b>	People are over-reliant on the first piece of information they hear. Our questions then prime our attention for certain information, ignoring or omitting contradictory data.
<b>Confirmation Bias</b>	We tend to listen only to information that confirms our preconceptions. Our initial decisions become self-fulfilling prophecies.
<b>Framing Bias</b>	How a situation is presented to you affects your decision.

### *An example of Anchoring Bias:*

When hearing that underserved communities are dangerous, we either stay away from the community but still claim to know or gather negative information only to support that theory without engagement or first-hand experience.

### *An example of Confirmation Bias:*

Believing someone can afford veterinary care for their pet but the person chooses to not provide or prioritize it. Then look to confirm the person is spending money on everything except veterinary care – phones, cars, clothing, etc.

### *An example of Framing Bias:*

When a picture of a dog or cat with injuries or illness is shared without context, talking about what poor condition the animal is in. The knee-jerk reaction is to feel badly for the animal and assume someone was cruel or neglectful.



**BELOW ARE OTHER TYPES OF DECISION-MAKING BIASES.**

DECISION BIAS	DISTORTION
<b>Availability Heuristic</b>	Vivid, easily imagined, but uncommon events are highly weighted in our brains.
<b>Recency Bias</b>	Recent events get weighted disproportionately higher than past events.
<b>Hindsight Bias</b>	Once we know something, we cannot remember when we did not know it. This challenges our ability to learn from past failures.
<b>Saliency</b>	The tendency to focus on the most easily recognizable features of a person or context.
<b>Ostrich Bias</b>	The decision to ignore dangerous or negative information by “burying one’s head in the sand,” like an ostrich.
<b>Bandwagon Effect</b>	The probability of one person adopting a belief increases based on the number of people who hold that belief (i.e., groupthink).
<b>Stereotyping</b>	Expecting a group or person to have certain qualities without having real information about the person.

**MINIMIZING THE EFFECT OF OUR BIASES**

To address these decision biases, we must challenge our decision-making process by realizing that we both influence and are influenced by the format of the information, as well as our own environment and experiences. Here are some strategies to minimize the impact of biases.

- Identify what bias you are most prone to. Self awareness is the first step. In the initial implementation steps section, you will find an activity to help you identify your personal implicit biases.
- Search for relevant or new disconfirming evidence. This comes through great observation skills. It means not just looking at one fact, but looking at all of the facts available to you. Ask additional questions to gain more information when you think you may be operating from a bias.
- Ask others what they think before telling them what you think. Too often, we lead others to a decision or to silence by sharing our opinions too quickly or too often. This prevents us from getting all the facts, and a fuller, more accurate picture of the situation.
- Reframe or flip the problem on its head to see if you are viewing the situation in either a positive or negative framework. Sometimes asking questions about the situation itself (rather than asking questions to a person) will reveal potential biases.
- Seek diverse perspectives and opinions. Check in with other colleagues and community members to see if they have the same observation that you have.

## Response

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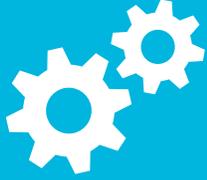
### Checking for understanding:

- What are the risks of perpetuating the three biases mentioned in the *Types of Decision-Making Biases* section?
- What are some strategies to minimizing these biases?

### Personal Reflection:

- Think of a time you discovered something unknown about yourself. How did you become aware of that realization?
- Take some time to jot down at least two biases you feel you may be prone to. You do not need to share these with others at this time, but it is important to acknowledge them to yourself as part of your ability to minimize the effect of your biases.





## *Initial Implementation Steps*

Exploring implicit associations will help uncover a bias you may not be aware of and will increase your awareness of how your bias may impact the way you view people in the community who are different than you. Visit [www.tinyurl.com/ML3A79S](http://www.tinyurl.com/ML3A79S) for Harvard's Project Implicit, which will give you options of 13 different tests you can take to uncover implicit associations. Complete at least one of the 13 Implicit Association tests. Although the categories are broad, the main objective of this activity is to explore implicit association on a personal level in order to be more conscious of it.

It is likely that as you take the test, you will feel the bias show up because you start to slow down and think more deliberately. Write your reflections using the following question prompts:

- Which test did you choose?
- What surprised you?
- What resonated with you?
- How does uncovering and acknowledging bias help you to increase your objective observation?

Share your reflections with a colleague or a group of colleagues.



## *C. How to acknowledge and appreciate differences*

There are various qualities, attributes, and beliefs that make us – as individuals and/or groups - different from others. Acknowledging that differences exist based on our backgrounds, upbringing, and life experiences is the first step in helping to build connections when people approach situations in very different ways. There is no denying that animal welfare is a field made up of predominantly white, middle class individuals. However, our society as a whole is not predominantly white and presents a diversity of socio-economic experiences. Therefore, if the movement wants to be of service to an entire community or more comprehensive in the work, the different racial and socio-economic experiences of others, as well as how our own backgrounds can impact interactions, must be recognized.

### **HERE ARE SOME STRATEGIES TO ACKNOWLEDGE AND APPRECIATE DIFFERENCES**

- 1.** Begin from a perspective of inquiry and learning. The best way to understand and manage across difference is to keep an open, inquisitive mind. Let yourself wonder why something is happening instead of judging.
- 2.** Try to understand the context of the differences, not just the differences themselves. There is a custom in many Nordic countries that embraces the cold and dead of winter with gleeful hope, instead of our “normal” practice of loving summer and sheltering up during winter. It’s strange, but it makes sense in context. These nations have long, cold, and dark winters, and they’ve adjusted their cultural mindset accordingly. Their differences are the result of the weather, not some cultural whim. Remind yourself that culture is a response to the environment, politics, and resources, not something that appears out of thin air. Noting these causes will help understand them.
- 3.** Find the “purpose,” or main aim, of the practices in question. There are very few things that people just “do” without a reason. Ask questions and carefully observe so that you can get over the immediate shock of certain practices that are misaligned with how you might approach a situation.
- 4.** Look for the underlying similarities in practices. There may be more you have in common than initially meets the eye.
- 5.** Know that you don’t have to agree with everything you observe and learn about in relation to the norms an individual or family are using with their pets in order to appreciate the community member(s) and who they are as a whole. Be open minded regardless of whether you agree or disagree.

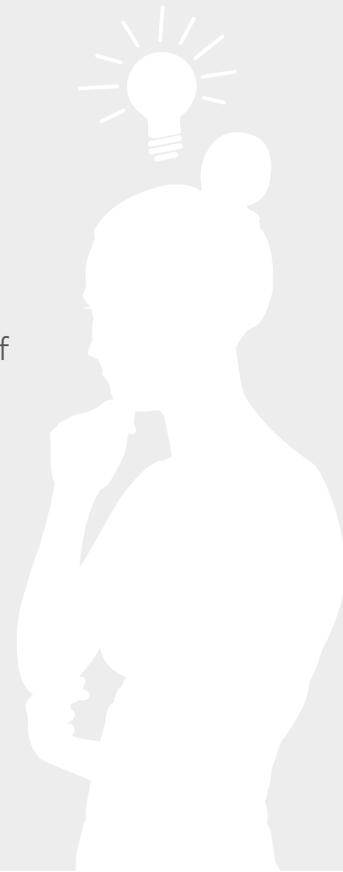


## Response

Consider some of the practices or norms that you have questioned related to the individuals and communities that you serve and their relationships with their pets.

What questions might you ask to begin from a perspective of inquiry and learning?

- What is the context of this difference? What resources does this person lack? What resources have they made use of?
- Why might this person have chosen this practice or norm?
- Are there any underlying similarities in the practice or norm that you do?



## Initial Implementation Steps

Discuss the following questions in a small group.

- What are some of the practices or norms that you have encountered in your work with community members and their pets that you have questioned or had a negative reaction to at first?
- What ideas do you have in trying to gain more understanding of why the community member does this with his or her pet? Or what have you learned when getting to know a community member better?
- How would acknowledging and appreciating the different experiences of others help you with your specific role in the PFL program?



## D. The importance of empathy

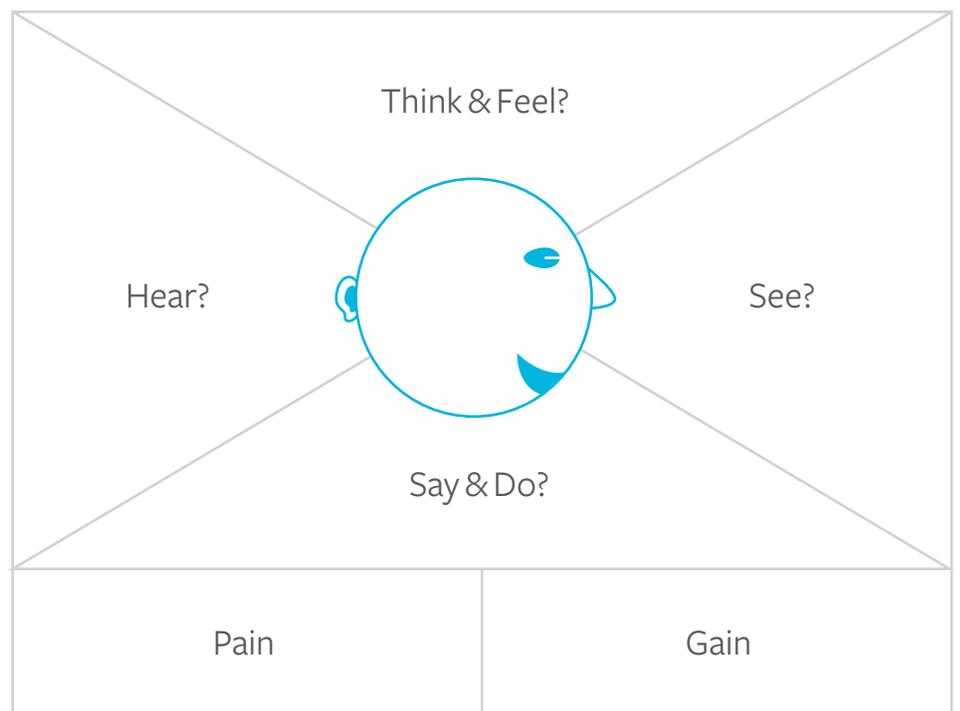
According to the Merriam-Webster dictionary, empathy is “the action of understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experience of another of either the past or present without having the feelings, thoughts, and experience fully communicated in an objectively explicit manner.”

In simpler terms, empathy is the awareness of the feelings and emotions of other people. It is a key element of emotional intelligence, the link between self and others, because it is how we as individuals understand what others are experiencing as if we were feeling it ourselves. Empathy goes far beyond sympathy, which might be considered ‘feeling for’ someone. Empathy, instead, is ‘feeling with’ that person, through the use of imagination.

Empathy is an important approach to help better your understanding of your clients’ experiences and in turn provides deeper insights into how you can better serve their needs. An empathy map is a collaborative tool that teams can use to gain greater understanding about their clients. Empathy maps can be used as a tool to immerse yourself in a client’s environment. They can be helpful, for example, when:

- Trying to understand how a particular outreach approach impacts the people it aims to serve.
- Elaborating on a community member’s persona (fictional, generalized characters that represent the various needs, goals, and observed behavior patterns among your real and potential customers).
- Building out the community member’s story.

Here’s a simple design of what it looks like:



## Response

Think about a time when your attitude and response to someone changed when you put yourself in the other person's shoes.

- What were the circumstances that led you to take that approach?
- What did you feel when you put yourself in the other person's shoes?
- How did those feelings inform your response to that person?
- How can you continue to put this into practice in your daily work?



## Initial Implementation Steps

Assemble a team and build an empathy map for an individual who you ideally want to benefit from your PFL program. Print out or sketch the empathy map template on a large piece of paper or whiteboard. Hand each team member sticky notes and a marker. Each person should write down their thoughts on stickies. To start, you might ask questions such as:

- What would the community member be thinking and feeling about his or her pet? What are some of their worries and aspirations?
- What would the person be thinking and feeling about having a conversation with PFL, having outside people at their home?
- What prior experiences with authorities or animal welfare may the community member be thinking about or could impact their feelings about interacting?
- What would their family, friends, and neighbors be likely to say while the person is engaging with PFL? What would the community member hear in these scenarios?
- What would the individual see while engaging with the PFL program?
- What might the community member be saying and /or doing when learning about PFL? How would that change in a public or private setting?
- What are some of the individual's pain points or fears when engaging with PFL?
- What gains might someone experience when engaging with PFL?

Have the team members speak about the sticky notes as they place them on the empathy map. Ask questions to reach deeper insights so that they can be elaborated for the rest of the team. To help bring the person to life, you may even wish to sketch out the characteristics he or she may have on the center of the face. At the end of the session, ask the team members what insights they learned. More importantly, ask them what hypotheses they now have about the person that they'd like to test and /or validate.



## WHY DOES RACIAL EQUITY MATTER?

### *A. Understanding race and equity*

As we look at issues of cultural awareness and sensitivity, such as practicing objectivity, acknowledging and understanding differences, uncovering and overcoming biases, and showing empathy, one of the main ways these issues arise in the United States (and internationally as well, albeit with different nuances) is through the lens of race.

Before getting into the examples of how race intersects with the animal welfare field, let's first look at some of the language we use when talking about race and equity.

#### **DEVELOPING A COMMON LANGUAGE**

Common language is important, because most people can agree on the need for racial equity, until we get into what is actually inequitable and what is not. It also helps us to be clear about what we are trying to achieve.

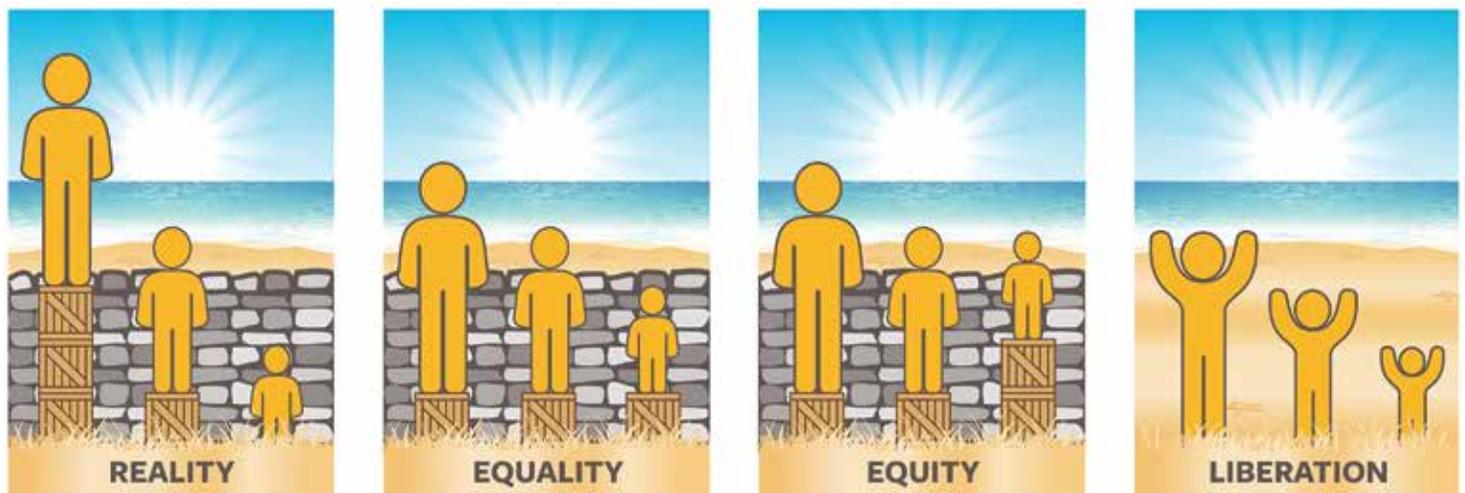
## EQUALITY ≠ EQUITY

### Equality:

The state of being equal (i.e. equal in rights, status, and opportunities).

### Equity:

Leveling access so that opportunities are fair and impartial. The center is transformed, and affects things from the inside out. We get to equality if we have equity, but things can be equal without having equity overall. This is described using the picture below:



As you see in the picture, the three people are trying to enjoy the beautiful sunrise. The wall that is keeping some from seeing the view represents systemic barriers to opportunities. The boxes that people are standing on represent the supports they receive in order to gain those opportunities.

In the first image, people not only have different starting points, but also our institutions and structures are set up to reinforce these advantages and inequities. This is the reality that we live in. In the second image, it is assumed that everyone will benefit from the same supports. They are treated equally. In the third image, individuals are given different supports to equalize access to the view. In the fourth image, all three people can see the sunrise without any supports or accommodations because the cause of the inequity was addressed. The systemic barrier has been removed. We may not be able to achieve this liberation in our lifetime, but this is what we are aiming to achieve through discussing issues around equity.



## DIVERSITY, INCLUSION, AND EQUITY

### Diversity:

- The demographic mix of human difference, with a focus on race and ethnicity (people of color), LGBTQ populations, women, and people with disabilities.
- The focus is on historically under-represented and marginalized groups (vs. just minorities).

### Inclusion:

- The degree to which under-represented groups participate fully in decision-making processes.
- While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be truly “inclusive”.

### Equity:

- Systematic fair and just treatment of people that results in equitable opportunities and outcomes for all.
- Tackling equity requires an understanding of the underlying causes of outcome disparities within our society, and differentials in power and privilege.

Many times, people will ask, “Why focus on race? What about all the other areas of class, socio-economic status, sexual orientation, gender, or disabilities?” We do not deny that these areas of identity are important to consider, yet when looking at the outcomes of these different identities, when overlaid with the outcomes of race, people are still most advantaged or disadvantaged based on race. Race is the strongest indicator of outcomes, more than other social identities, so we have to purposefully center it in our conversations.

For example, when looking at the outcomes of gender, it is commonly known that men are systematically advantaged and women are systematically disadvantaged (salary and treatment in the workplace). Yet when one looks at how white women are often earning higher salaries than black men, it shows how the system is even more impacted by race.

Additionally, race is often the most difficult to talk about due to these structures that give advantages and disadvantages to people within our society.





**Structural racism** in the U.S. is the normalization and legitimization of an array of dynamics – historical, cultural, institutional and interpersonal – that routinely advantage whites while producing cumulative and chronic adverse outcomes for people of color.

Historical and structural racism is the context for understanding how we can shape more equitable organizations, interpersonal interactions, and individual behaviors. We live in a deeply inequitable world. Our beliefs and institutions inevitably reflect this world, despite our best intentions. If we acknowledge that racism exists in ourselves, our groups, and our institutions, then the work can begin.

The first step in acknowledging racism is often the hardest. Someone who is racist is typically reserved for the outright white supremacists who treat people in negative ways solely on the basis of race. However, when understanding that racism can exist in different levels, it helps to see how we have all been shaped by racism.

#### **FOUR LEVELS OF RACISM**

**The Micro Level (symptoms)** describes the issues that focus on personal or individual perspective, which are influenced and reinforced by the dominant ideology on a consistent basis. This also includes the relationship between individuals or groups and is most often referred to when discussing issues of racism.

**The Macro Level (systems)** refers to oppression and discrimination that happens in the larger society. This includes social institutions, systems, and structures. Social institutions may include the media, organized religion, the government, or educational systems.

**BELOW ARE DESCRIPTIONS AND EXAMPLES OF THE FOUR LEVELS OF RACISM:**

MICRO LEVELS	MACRO LEVELS
<p><b>Intrapersonal / Internalized:</b> Occurs within individuals and groups. It is behaviors, attitudes, and messages that people have internalized about themselves, about their racial/class/gender/identity group and about other groups based upon dominant culture socialization.</p> <p><i>Examples:</i> Unconscious bias, internalized superiority among white people, and internalized inferiority among people of color.</p>	<p><b>Institutional:</b> Occurs within institutions. It is discriminatory treatment, unfair policies and practices, and inequitable opportunities and impacts, based on race.</p> <p><i>Examples:</i> A school system that concentrates people of color in the most overcrowded, under-funded schools with the least experienced educators; classroom practices and pedagogy that implicitly assume white cultural norms as the default.</p>
<p><b>Interpersonal:</b> Occurs between individuals. Once we bring our private beliefs into our interactions with others, racism is now in the interpersonal realm.</p> <p><i>Examples:</i> Micro-aggressions, bias and bigotry between individuals, hate, and violence.</p>	<p><b>Structural:</b> Occurs across institutions and society. The cumulative effects of a variety of factors that systematically privilege white people and disadvantage people of color.</p> <p><i>Examples:</i> Racial wealth divide resulting from generations of discrimination, genocide, displacement, violence, forced and exploited labor, and discriminatory and exclusionary policies and practices.</p>

We tend to focus on interpersonal racism, but institutional and structural racism are equally if not more important. It shapes how we understand norms and who is privileged and has power. We need to be able to see how structural racism is at play in our organizational impact in order to truly understand the relevance of racial equity to our work.

Understanding the four levels of racism helps us to constantly ask:

- What are the external factors that are influencing and shaping our reality?
- What cycles and patterns can we identify?
- What are the structural factors shaping this individual behavior / interpersonal interaction?
- How are policies, practices, and programs creating unsatisfactory outcomes for some and expanded privilege for others?

**CONCLUSION**

An anti-oppressive lens requires an analysis of power, and an understanding of how power dynamics are playing out in any relationship or system. When we look at the relationships and systems that exist in our organizations, we have to look at both our internal efforts with colleagues and our external efforts with community members.

Embed an equity lens by:

- Diffusing responsibility instead of siloing and concentrating (We are all dedicated to fighting racism, not just the people of color in the organization)
- Creating new habitual norms and behaviors
- Considering systems in multiple areas of organizational life (primes and protocols to help us consistently implement fair and just actions)
- Experiment, fail, practice – it is not a linear process

## Response

- As you consider diversity, equity, and inclusion in your organization, which area does your organization need to grow in the most?
- How do issues of diversity show up in your programs and operations?
- As you consider the four levels of racism, what questions come up for you about these levels? Can you identify examples you have personally seen of each level of racism?
- Why might it be important to understand the four levels of racism? How does it impact your understanding of race and equity?



## *Initial Implementation Steps*

- Share your questions with a colleague or a PFL staff member.
- Share notes with your colleagues around example of the four levels of racism that you have seen and why it might be important to understand these levels.



## *B. How race intersects with the animal welfare field*

Considering the aforementioned definitions, here is the connection to the animal welfare field. Race and issues of inequity are not isolated. Research and facts show every segment of society is impacted – housing, healthcare, education, criminal justice – and animal welfare is not exempt.

Our field is not somehow the magical place where race doesn't matter. In our work it is not enough to *NOT* be a racist on an individual level, we have to be anti-racist. To truly be anti-racist we must pay attention to and address structures of societal and systemic inequity.

What may be seen as race-neutral policies are dangerous because they assume everyone starts out at the same place or has equity in access, treatment, and outcomes.

We can't design and implement programs and policies without considering race.



**EXAMPLES OF THE FOUR LEVELS OF RACISM IN ANIMAL WELFARE:**

MICRO LEVELS	MACRO LEVELS
<p><b>Internalized:</b></p> <ul style="list-style-type: none"> <li>● Those people in bad neighborhoods (they, those areas, inner city, ghetto, etc.)</li> <li>● I have to convince certain people to spay/neuter their pets</li> <li>● If we don't mandate something like spay/neuter, some people will never do it</li> <li>● Some people just don't care about animals as much as I do</li> <li>● I would choose to live in my car before I gave up my pet</li> <li>● I would go without food for myself in order to feed and take care of my pets</li> <li>● If people obey the law they wouldn't get in trouble</li> <li>● Deterrents like fines will encourage people to make better decisions</li> <li>● If you can't afford a pet, you shouldn't have one</li> <li>● People don't value a service unless they pay something</li> <li>● I have an obligation to save animals and find them better homes</li> </ul>	<p><b>Institutional:</b></p> <ul style="list-style-type: none"> <li>● Job requirements that emphasize credentials but not cultural humility/competency</li> <li>● Staff are almost all white despite race being non-white in community served</li> <li>● Ordinances that criminalize poverty and disproportionately impact people of color through enforcement – failure to provide veterinary care, mandatory spay/neuter and microchipping, tethering restrictions, return-to-owner fees</li> <li>● Limited hours that shelters or clinics are open</li> <li>● Location of services</li> <li>● English only information and materials</li> <li>● Breed-specific policies</li> <li>● Adoption prerequisites, such as landlord checks, fence requirement, veterinary history, home visits</li> <li>● Means testing and income qualification</li> </ul>
<p><b>Interpersonal:</b></p> <p>Attitudes toward people that elevate one type of person over another, such as:</p> <ul style="list-style-type: none"> <li>● We have to figure out programs and approaches that change other people's behaviors</li> <li>● We have to teach people how to be responsible pet owners</li> <li>● We have to teach compassion for animals in certain schools</li> <li>● We have to educate certain people or communities on how to care for their pets or what proper care looks like</li> <li>● We are nicer to people when they outwardly show their appreciation</li> </ul>	<p><b>Structural:</b></p> <ul style="list-style-type: none"> <li>● We encounter inequitable access to: veterinary care, homeownership, education, safe / secure housing, union jobs, healthy food, and safe places to play / exercise / be healthy. Even when access is achieved, people are treated differently and outcomes are disproportionate. Residents and program participants are either targeted for destruction by racism or face big struggles as a result of intersecting forms of institutional racism, including: policing, bank lending, education, housing, military recruitment, health care, job opportunities, and anti-immigrant and drug policies. Without being equipped to see and address how race affects their outcomes, we cannot deliver on our mission.</li> </ul>

## Response

### Relevance of a Racial Equity Lens on our Mission, Individual Reflection:

- Why aim for equity and liberation? What are the hidden costs of the status quo?
- Why and how might engaging with a focus on racial equity in your work be critical to the mission of your organization?
- How would you make the case for racial equity?



## Initial Implementation Steps

Answer the following questions and discuss with your colleagues:

- How do the four levels of racism show up and manifest in our work?
  - What's hardest to name, and why?
- What are different parts of the organization where we may notice, experience, and disrupt racism?
- How do our current operations and programs allow us to engage all community members and point them towards access to resources?
- How are we creating pathways to opportunity and narrowing disparities?
- How might we engage all staff in this conversation?



## ASSESSMENT OF SELF AND THE ORGANIZATION

The key to self-awareness is to be able to recognize when the *impact* of what we are thinking and saying is out of step with our *intent* or with our perceptions of self. This section invites you to consider your identity, how it intersects with race, and to consider potential areas of growth.

### *A. Your identity through the lens of race*

Personal identities/lived experiences are relevant to any work we do around race (what we believe ideologically and politically is just part of it). These affect what we see and don't see, along with how we build relationships and trust on an interpersonal level.

We need to clarify our personal and professional relationship to power as it relates to race - which of our identities in a social-political context are dominant, and which are marginal?

To participate fully in conversations about race and racial equity, we need to first locate ourselves. When, where, and how do I enter conversations about race? How does my story intersect with racism and other forms of oppression? What is my personal and professional relationship to power?

The practice of deepening our historical understanding of our own identities and how they are related to other people's identities:

- provides space for us to examine the impacts of oppression.
- roots our experiences in a historical context.
- creates opportunities for connection.

How does personal identity matter? How I am perceived may be different than how I perceive myself. In the same manner, how I perceive community members may be different than the reality they experience.

We all approach differences with our own implicit biases and cultural norms, and it is important to consider how these can reinforce potential inequities. Not all identities are created equal – when thinking about our identity versus another, we are not just talking about difference, but also about differences in power and privilege. We cannot talk about identity without talking about power and privilege.

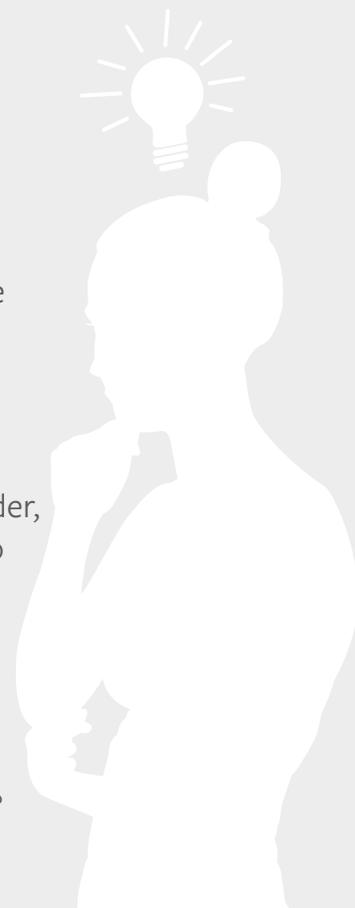
## *Response*

### **How would you answer the following:**

- What is the story of your name?
- How do you identify?
- Of the various identities that you hold, which one is the most significant to you (it is most often top of mind)?
  - Why is that identity most significant?
- Of the various identities that people may hold, such as race, sexual orientation, age, educational background, socio-economic status and class, disability status, gender, national origin, etc., which one is the least significant to you (you rarely think of it)?

### **Debriefing Identity:**

- Which of your stories are hyper-visible? Which are less visible?
- Where and how does your story intersect with racism? With other forms of oppression?



## *Initial Implementation Steps*

Consider sharing your answers around identity with others in your organization. Pay attention to what other people call out as important to them – there is always a process through which we get to identity significance. What we don't call out (e.g. being white, being able-bodied) is often what we have the luxury or privilege of taking for granted. These have become “norms” for the dominant identities in our society.



## *B. How to assess your readiness to engage in racial equity work*

- Cultural responsiveness is a core practice for advancing diversity, inclusion, and equity.
- Cultural responsiveness affirms the cultural values and includes the voices of under-represented groups.
- The end goal of cultural responsiveness is to close gaps in access and outcomes for these under-represented groups.

### **What does it mean to be aware of dynamics of race / racism?**

It means that we acknowledge the historical context of racism, and how it impacts our world as we understand it. It means that we see examples of how race influences the outcomes for communities on seemingly race-neutral issues like health outcomes, participant retention, etc.

### **How do people become aware? What are the sources of awareness?**

For many people of color, it is through lived experience. For those who have not directly received racism, they may become aware through observing the major milestones and how these are different for different groups of people. It may be through self-education – reading books, articles. Or likely, it is through being in relationships with others who have received racism and learning from their lived experiences. This often places an extra burden on people of color to “educate” white people.

### **Discomfort**

This conversation can become very uncomfortable. For people who carry more dominant identities (e.g. white folks), just not knowing, or realizing how little one knows, can feel discomfoting. For people who carry more marginal identities, they often find discomfort in carrying the burden of being the one to educate, call out, or name problematic structures/behaviors.



## Response

Rate yourself on the following statements on a scale of 1 to 5 (with 1 being never/rarely and 5 being often/all the time):

1. I am aware of how dynamics of race and racism affect our community.
2. I am aware of how my identity (race/gender/sexual orientation, etc.) impacts my interactions with community members.
3. I feel comfortable talking about race, racism and racial justice in this community/workplace.

Individual reflection after self assessment:

1. What are the sources of discomfort for you?
2. What can you do to increase comfortability with discomfort in order to continue these important discussions?



## Initial Implementation Steps

- What do you need to know from others in order to continue conversations that may be uncomfortable?
- What expectations or norms can you agree to in order to have this conversation in a way that is honoring of each other? (This might be a good time to review the suggested group agreements found in the *How To Use This Guide* section on page 6).

## C. *How to assess your organization's readiness to engage in racial equity work*

To move beyond an individual commitment to racial equity work to a commitment that is shared across an organization, it is helpful to establish a point of view on your organization's cultural competency, a core practice for advancing inclusion and equity. We define cultural competency as a willingness and ability to intentionally center the distinct cultural values, beliefs, and practices of diverse communities in the interaction between service provider and those being served, and to adapt services to meet the needs of these communities. It emphasizes the need to affirm the cultural values and include the voices of under-represented groups with the end goal of closing gaps in access and outcomes for these groups.

### THREE KEY COMPONENTS OF ORGANIZATIONAL CULTURAL COMPETENCY ARE:

- **Organizational climate** and support for engaging in cultural competency work;
- Whether outreach, **programs and services** are developed, evaluated, and refined with appropriate consideration of the cultural needs, preferences, and differences of the service population; and
- **Awareness, knowledge, and skills of staff** in relation to cultural competency

Bearing these components in mind, it is important to locate where you would place your organization on the continuum of cultural competence below, based on the National Center on Cultural Competence's framework:

**1. Cultural destructiveness:** The most negative end of the continuum is indicated by attitudes, policies, and practices that are harmful to individuals and their cultures. The system or agency may not intentionally seek to be culturally ruinous or destructive; however, the system may lack the capacity to assist different cultures of individuals and/or communities.

**2. Blindness:** The organization and its employees provide services with the expressed intent of being unbiased. They function as if the culture makes no difference and all the people are the same. Limited interest in acquiring and using cultural knowledge.

**3. Pre-competence:** Individuals and organizations move toward the positive end of the continuum by acknowledging cultural differences and making documented efforts to improve.

**4. Competence:** This end of the continuum is indicated by acceptance and respect of cultural differences, continual expansion of cultural knowledge, continued cultural self-assessment, attention to the dynamics of cultural differences, and adoption of culturally relevant organizational norms and service delivery models to better meet needs.

**5. Proficiency:** The most positive end of the continuum is indicated by moving employees' attitudes and openness to cultural competency into policies, procedures, strategies, and program development. The organization provides ongoing staff development and use of data around cultural competence and consistently engages community stakeholders.

## Response

### Individual Reflection:

- How do I unintentionally or otherwise get in the way of my organization advancing on the continuum?
- Have I positively influenced my organization in advancing on the continuum? If so, in what way(s)?



## Initial Implementation Steps

Answer the following questions and discuss with your colleagues:

1. Using the cultural competency continuum as a guide, where do you think our organization is?
2. What are our opportunities to deepen a focus on racial equity in our work? What can we do differently?
  - a. In our outreach?
  - b. In our staff meetings?
  - c. In our culture?
3. What is our vision for a commitment to a racial equity lens and practice as an organization in the animal welfare field?



# CHAPTER 3:

# Effective Marketing and Communications

## *Overview*

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This chapter looks at your organization's role in responsibly and thoughtfully marketing and communicating your community outreach program. There are concrete, effective ways to tell the story about the people and communities you serve in ways that avoid perpetuating harmful stereotypes while inviting your supporters to learn more about the nuance of creating equity and long-term access to resources in underserved communities. As your organization tells this compelling story, it increases alignment with supporters, which in turn, increases the sustainability of the program. There are two sections included:

### **Communicating the Connection**

- A. How to communicate a social justice approach
- B. Why language matters
- C. How to respond to common misconceptions and doubts

### **Fundamentals of Effective Communications**

- A. Best use cases of PFL data in communications and marketing
- B. How to adopt a strategic approach to communication
- C. How to tell a story
- D. How to effectively use images
- E. How to develop a social media strategy

## *Keep in Mind*

The general public takes its cues from what you, an animal welfare expert, say and do. As such, there's genuine influence in, and repercussions to, the narratives we create. Just take a cursory glance at the comments sections of any number of organizations' social media pages - you don't have to look far to see some fairly angry language implying how generally cruel people are. When we see that rhetoric become commonplace it's important to look at how and why we may be fanning those flames. Are we taking the time to consider our stories with an open, balanced mindset, ensuring we're broadcasting the most accurate message possible, or are we automatically reaching for familiar, traditional messages that can create or validate an 'us versus them' mentality?

Having someone to root against can be galvanizing. But what do we do when there's no clear-cut villain? How does the story change when that thin dog is coming into the shelter only because his owner was being evicted, he got loose, and she hadn't been able to get him some dewormer?

We must ask questions and learn in order to tell accurate and nuanced stories, or at a minimum not make assumptions that vilify a person. It is all too easy for our messaging to fall into the trap of creating extremely narrow definitions of who is capable of compassion or what compassion must look like.

As you read this chapter, consider how stereotypes and assumptions work to paint entire communities with a broad brush, making both small and large impacts. How can your messages isolate people or bring them together? Even when done inadvertently, messages can perpetuate myths that have staying power and affect the world beyond just the animal welfare field. Over time, the individual stories we tell become our organization's identity. In aggregate, these stories can define our field as a whole, as well as how people direct their support.





## COMMUNICATING THE CONNECTION

### *A. How to communicate a social justice approach*

The first step to creating an effective communications plan around a program as driven by social justice as PFL is to nurture an in-depth understanding of systemic poverty and the barriers people experience within the communities you serve. In what specific ways does housing or food insecurity impact people, and by connection their pets, on a regular basis? In addition, it is essential to look within and investigate how biases can lead to the creation of inequitable policies and divides between your organization and underserved communities. The content in Chapter 2 of this guide is essential to this process.

The next step is to outline a detailed, manageable marketing and communications strategy. Below are some key factors that should be taken into account when developing this plan:

- **Consistency:** Create a calendar, specifying the dates of your marketing activities and what program theme or story you plan on incorporating into your marketing message. The more you can plan ahead the easier it will be to stick to the strategy long term.
- **Diversify:** The best plans are integrated with all of the marketing methods your organization uses. Program messaging should be incorporated into and consistent across all platforms; web, social media, video, email communications, public relations, event graphics, brochures and other printed materials.

**Internal Communication:** The person doing door-to-door outreach should be in contact with the staff who oversees marketing and development. Outreach staff can supply content, such as client stories, pictures, and video on a regular basis and also assist in making sure messages are crafted authentically and in a way that's respectful to the community and advocates for the people and pets you serve through the program.

**Measurable Goals:** There are multiple tools available to track the effectiveness of your marketing plan. You can monitor and analyze website traffic, social media engagement, and e-blast open/click-through rates or even solicit feedback from your supporters through an online survey or focus group. The more information you have on how your messaging is being received, the more you will be able to fine-tune your approach so that it speaks to your audience.

**Hold Yourself Accountable:** With each message centered on your outreach work, always ask yourself the following questions:

- Are my efforts and messages driven by the needs and voice of the community?
- Am I being considerate with my language?
- Is the story based on the individual or does it feed assumptions and stereotypes?
- Could my message be misinterpreted and what would be the impact?
- Would I be comfortable showing this to people who are being served in the community?

There are a few additional elements to keep in mind as you are developing your marketing messages:

- Tell client stories in an authentic, nuanced, and inclusive way, showing positive impact and celebrating the bond between person and pet.
- Include a call to action, specifically an opportunity to donate to the program.
- Connect funds raised to services/supplies provided through the program, so donors feel they're making a tangible impact.
- Engage people on a personal level, connecting them to the work and giving them an outlet to put themselves in someone else's shoes and gain a different perspective.
- Look for every opportunity to thank your individual supporters, major donors, and key program partners to strengthen those relationships and build positive donor stewardship.
- Keep in mind ways to incentivize giving, such as creating excitement around matching grants and using crowdfunding platform tactics where donors can monitor progress towards a campaign goal.
- Consistently utilize approved marketing identity elements to reinforce your organization's brand.

## Response

Conduct a brief review of your organization's marketing messages, as well as messages from a few other organizations you know. How many of them include a human element? How many are specific to pet ownership in underserved communities? Where there are photographs, how many include a person of color in a positive way?

Consider the messages you see posted on your organization's website or social media page, or even how staff members have discussed a particular situation in the break room. Challenge yourself to think about how the story could be told or how the conversation could be had from an opposite or differing perspective.



## Initial Implementation Steps

Discuss in a small group:

With a group of your colleagues at your organization, spend 30 minutes reviewing **[www.radiaid.com](http://www.radiaid.com)**. Radi-Aid is an annual campaign created by the Norwegian Students' & Academics' International Assistance Fund (SAIH). The goal with Radi-Aid is to challenge the perceptions around issues of poverty and development, to change the way fundraising campaigns communicate, and to break down dominating stereotypes.

View the videos on the website, being sure to explore the Radi-Aid Awards section. What stands out to you? How do the ideas presented here relate to the marketing of your outreach work? Discuss as a group.



## B. Why language matters

Your ability to use descriptive language rather than evaluative language will increase your effectiveness in engaging in discussions that involve differing perspectives.

EVALUATIVE LANGUAGE	DESCRIPTIVE LANGUAGE
<ul style="list-style-type: none"> <li>● <b>“YOU”</b></li> <li>● <b>Attacks</b></li> <li>● <b>Person</b></li> <li>● <b>General</b></li> <li>● <b>Cause</b></li> <li>● <b>Absolutes</b></li> </ul> <p><i>Example:</i> Those people are so irresponsible and lazy! They don't care about animals, and I would never be involved with a program that supports them.</p>	<ul style="list-style-type: none"> <li>● <b>“I”</b></li> <li>● <b>Reports</b></li> <li>● <b>Behavior</b></li> <li>● <b>Specific</b></li> <li>● <b>Effect</b></li> <li>● <b>Qualifiers</b></li> </ul> <p><i>Example:</i> It sounds like when you saw the dog tethered outside, you felt like the owner was not caring for the dog in the same way you would have. What might be an alternative to what you felt was going on here?</p>

A requirement of the PFL approach is maintaining thoughtful communication with all members of the community at all times. Exercising cultural humility – the practice of looking inward and examining implicit bias – is an essential ingredient to being just, inclusive, and sensitive to the perspective of all communities. People are experts on their own relationships with their pets. A fundamental part of being equitable is for all types of service agencies to listen to community members, learn from their knowledge, provide opportunities for sharing and then integrate this feedback into the way we conduct our work and the stories we tell.

In addition to listening carefully and valuing viewpoints that are not one's own, positive relationships are also built through respectful conversations. While certain words and phrases may be common among people in the bubble of animal welfare, it's imperative that those within the field understand and acknowledge how language may be interpreted, or misinterpreted, by people who have different experiences.

Below are a few words, phrases and topics that are frequently used in the animal welfare field that have varying degrees of consequences.

### “Educate”

- **As in:** “I’m going to educate people about the proper way to care for their pets.”
- **The problem:** This implies that you’re unequivocally right and know the only way something can be done. It can also create a skewed teacher/student dynamic, where the person who is “educating” holds the power and can be perceived as talking down to his or her audience.
- **The alternative:** “I’m going to share information with people about the resources I have to offer.”

### “Responsible”

- **As in:** “Our organization has an outreach program to teach people how to be responsible pet owners.”
- **The problem:** It’s subjective and a matter of lacking access to resources. People are overwhelmingly caring.
- **The alternative:** Break the habit of using this word to describe people. It’s judgmental and shortsighted.

### “Neglectful” and “Cruel”

- **As in:** “We won’t knock on the door to that house – those people are neglectful and cruel to animals.”
- **The problem:** People are inherently good, not malicious, and are doing their best with limited resources.
- **The alternative:** Be extremely careful with how you and your organization label people with these words. They’re not only hurtful and almost always inaccurate, but they can also permanently damage a person’s life if punitive measures are taken when the person and pet just need the info and resources we have.

### “Humane Education”

- **As in:** “Kids in underserved communities need humane education, so they grow up to be responsible.”
- **The problem:** In the context of underserved communities, to “humanely educate” tends to imply that people in the community are disproportionately apt to not care or value animals in the same way as the educator. Also, education on pet care does painfully little when resources are inaccessible in the first place.
- **The alternative:** Focus efforts on creating consistent access to services, sharing information along the way.

### “They/Them”

- **As in:** “The benefits of spay and neuter is lost on them.” / “They shouldn’t leave their dog outside.”
- **The problem:** People, and the places they call home, have names. In general, you should use them. Replacing specifics with personal pronouns can seem like you’re painting entire groups of people with a broad brush. It’s also inherently divisive, labeling someone else as “the other”.
- **The alternative:** “It’s important to be patient and clear when telling the community about procedures that may be unfamiliar and intimidating.” / “We’re going to visit the Smith family about supplying a dog house for Diamond.”

## Response

What are some of the ways you have heard people use evaluative language about community members in regard to their pets?

Write out some of the statements you have heard and practice reframing or responding to those statements with descriptive language.



## Initial Implementation Steps

Gather a small internal group within your organization, preferably including any staff members who manage marketing and communications activities. Collaboratively, review some of the stories and messages your organization has recently posted on your website, social media pages, and newsletters. Are there traces of implicit bias or stereotypes in the message and, if so, how can you craft a message that is more nuanced and relatable to residents of your entire community?

Evaluate these messages through the lens of evaluative and descriptive language. Are these messages considerate and inclusive of the experiences of your entire audience, even people in your community who might not be as connected to the animal welfare world? Discuss as a group and brainstorm on how to adjust words and phrases that use evaluative rather than descriptive language.



## C. How to respond to common misconceptions and doubts

Animal welfare has too often formed negative opinions about people based on where they live or level of income. Stereotyping entire communities is not uncommon, both within and outside of the animal welfare movement, and it creates an “us versus them” mindset. As you promote your outreach work, there will likely be a small segment of people who do not understand or disagree. It is helpful to have some consistent responses prepared in these instances. Here are a few typical comments based on people’s misconceptions, and replies to those comments.

**COMMENT:** “If they can’t afford a pet then they shouldn’t have one.”

**REPLY:** “It’s our belief that no one should be denied the benefits and comfort that come from having a pet, and a lack of financial means does not mean there is a lack of love and connection between the person and the dog/cat. We are proud to provide pet owner support services in underserved communities as part of our mission to keep people and pets together and celebrate the human-animal bond.”

**COMMENT:** “I don’t think services should be free. People should have to pay something so they value what they’re getting.”

**REPLY:** “The people we serve through the program absolutely appreciate the free services we provide. But the area we serve has a high rate of poverty and people experience many daily barriers to accessing resources, so services are free out of necessity since even low-cost services can often be out of reach. We feel it’s more about doing the right thing and removing those barriers to keep pets happy, healthy, and in their loving homes.”

**COMMENT:** “What do you do when you encounter neglect or cruelty?”

**REPLY:** “We can tell you from having a lot of experience doing door-to-door outreach and building positive relationships in the community, we don’t see many cases of neglect or cruelty and we challenge the traditional definition and application of these terms. What we do see regularly are people who are deeply connected to their pets but do not have access to affordable resources. We’re happy to be able to provide those and keep families together!”



**COMMENT:** “What about safety? How do you stay safe in such dangerous neighborhoods?”

**REPLY:** “There are many misconceptions about underserved communities, and one of those myths is that danger is around every corner. It’s simply not true. Our outreach team builds relationships on people’s front porches on an almost daily basis and focus on listening to people, treating them with respect and compassion. We have met so many wonderful people who are very welcoming.”

**COMMENT:** “You provided services for a person with 3 dogs? Isn’t that too many for them?”

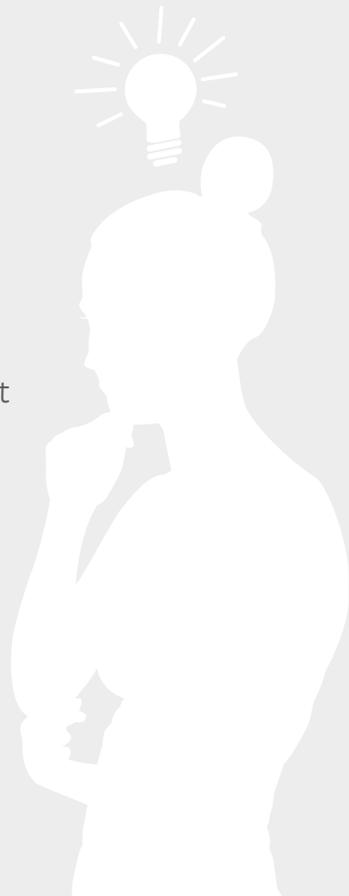
**REPLY:** “It’s the family’s choice, and they are in the best position to determine what’s right for them. The pups are fortunate to be in a home filled with so much love and we are lucky to be able to provide support!”

## Response

What are the common stereotypes you’ve heard within the animal welfare field? Here are some harmful examples we have heard all too often:

- Young African American men are at risk of growing up to fight dogs.
- Most free-roaming dogs on Native American lands are not owned or cared for.
- People in underserved communities do not act as caregivers for outdoor cats in the community.
- Latin American men are macho and are not interested in neutering male dogs.

Consider these blanket statements about groups of people. How might you respond to someone who makes these claims? What other stereotypes resonate with you as untrue and insensitive?





## *Initial Implementation Steps*

Practice viewing situations through a non-judgmental and unassuming lens. With a small group of coworkers, including those in marketing and communications roles, briefly review the following:

- A dog is brought into the shelter by a staff member who found him roaming free in a low-income community through which she was driving.
- The dog is bit underweight and wearing a collar that is a little tight. Attached to the collar is a piece of an old, worn tether.
- The staff person who brought him in is angry and frustrated, saying things like, “Whoever neglected him deserves the same or worse” and “I don’t understand how people could see this dog running around and not do anything”.
- A week later, a man comes in looking for his dog. He shows the person at the front desk a picture of the dog on his phone, and it is clear he belongs to him.

Individually, take approximately ten minutes to re-construct a story with a few short paragraphs, challenging yourself to think of ways the situation does not exemplify neglect but is rather the result of a lack of access to pet care resources and of all the variables that could be part of the full story. Create an ending to your story as well. Share your story with your colleagues and reflect on the differences and similarities in your stories.



## FUNDAMENTALS OF EFFECTIVE COMMUNICATIONS

### *A. Best use cases of PFL data in communications and marketing*

At times there is a need to evolve or add to mission-level metrics and acknowledge that current measurements fall short of telling the complete story of the animal welfare field and how it intersects with the entire pet-owning population. Most metrics used in the field are shelter-based (intake, euthanasia, adoptions, length of stay, etc.) and, while important, this data fails to adequately show programmatic impact within the community, outside the shelter walls. PFL takes into account different measurements and perspectives that more appropriately define programmatic success in the context of underserved community engagement and long-term impact.

While not an exhaustive list, below is a list of typical data points that, when combined with stories, photos, and videos from people and pets served and other key program content, makes for a potent marketing formula that can engage your supporter base.

**Data that illustrates overall program need and the reality of systemic poverty within your focus area:**

- Gather details about your program focus area (challenges surrounding gentrification, mass incarceration, housing instability, food insecurity, etc.)
- Community assessment information (percent below poverty, median household income, racial percentages, etc.)
- Community resource map, showing lack of proximity to veterinary clinics, pet supply stores, etc.

**Data that tells the community's story and shows the isolation from services that pet owners experience:**

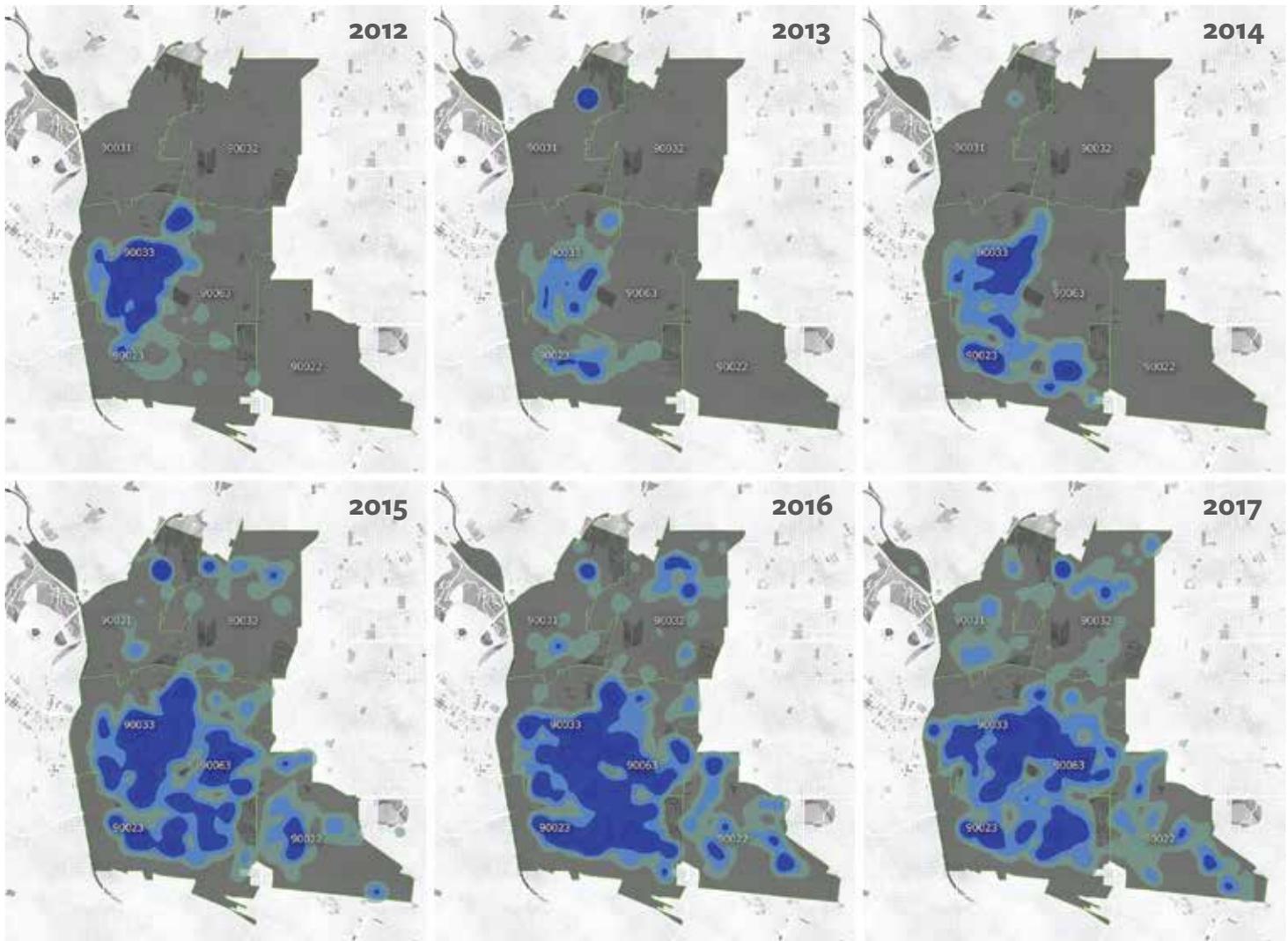
- Percentage of pets unaltered when met and conversion rate
- Percentage of pets that have not seen a veterinarian
- Percentage of clients who have never contacted an animal service agency
- Information on where people have acquired their pets
- Percent of people needing transportation support to and from veterinary appointments

**Data showing the community-level impact you are making through door-to-door outreach and by providing direct care services:**

- People and pets served
- Individual medications, services, and supplies given
- Spay and neuters completed
- Return-to-owner support
- Pet deposit and housing support

Program effectiveness is also measured through long-term focus, which results in consistent community engagement and stabilization of resources over time. Trust in the program is built through steady, strategic door-to-door outreach, and that drastically increases word-of-mouth, referrals and repeat services to new and existing pets within households that have already been engaged.

PFL migrates over time throughout focus areas, maintaining relationships with current clients and pets while continuously meeting new ones, never truly leaving an area because as long as poverty exists, the program approach and subsidized services will be needed. These measurements can be expressed through saturation maps that chart program data, such as locations of pets served, and are created regularly to influence outreach strategies and inform long-term program growth and migration through the focus area.



In aggregate, these ongoing measurements, as well as feedback directly from residents of the community, paint a comprehensive picture of sustainable community support in underserved communities that are impacted by the persistent pressures of poverty, institutional discrimination, racism, segregation, and exclusionary and one-sided policies. There are no shortcuts to creating transformative, positive change for underserved communities that historically and habitually have not been taken into account by the animal welfare field and pet service providers.

## Response

Consider what data you have collected and where there are gaps in what you currently have.

- What steps can you take to gather and organize this data, so it is readily accessible to everyone at your organization who needs it?
- What might be preventing you from gathering the aforementioned data in a consistent way?



## Initial Implementation Steps

Review this section with your outreach staff and marketing and development officers. Take inventory of the data you have and create a system for organizing and sharing information on a regular basis. Consider the following and create a manageable plan, so your organization always has access to the most up-to-date program data for marketing and fundraising purposes.

- Select a day during each week and set aside time for the outreach person to send the communications team one or two stories from outreach that illustrate various aspects of the program.
- Can you create a dedicated PFL folder on a shared drive or computer where everyone can access program materials as needed?
- What is the best way for the outreach staff to share client stories and photos; email, Google docs, etc.?

Consider having regular standing meetings where all pertinent staff can share, ask questions, review/approve marketing activities, etc.

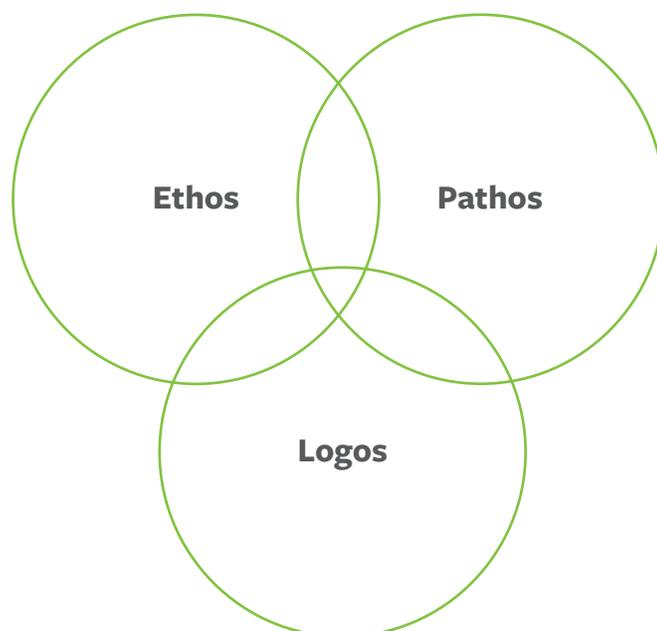


## *B. How to adopt a strategic approach to communication*

The success of any communication effort hinges on knowing your audience. One of the ways to know your audience is to consider what type of communication they respond to best. Different people respond more favorably to different types of appeals; they tend to hear and receive appeals in one of three ways:

- **Ethos:** responds to ethics, right/wrong, good/bad
- **Pathos:** responds to emotions/emotional connections
- **Logos:** responds to logic of an argument or sense of reasoning

We receive information ourselves more readily in one of these types of appeals. Pay attention to where you might be aligned or misaligned with your audience. Don't try to be everything for everybody – you'll often miss connecting with someone if you're trying to appeal to them in all three ways.



## Response

### Same Fact, Different Tone

In August 2017, there were 61,471 homeless people, including 15,315 homeless families with 22,970 homeless children, sleeping each night in the New York City municipal shelter system. Families comprise just over three-quarters of the homeless shelter population.

Read the following sentences and identify whether they are appealing to a person with ethos, pathos, or logos.

1. It is a travesty of justice that this city allows the homeless shelter population to stay at 61,000 people every night.
2. How sad it is that 61,000 people - over a third of which are children - have go sleep every night in a homeless shelter, without a place to call home.
3. The average homeless population sleeping in shelters in NYC every night stands at about 61,000.



Answers: (1 = Ethos, 2 = Pathos, and 3 = Logos)



## Initial Implementation Steps

Reflect on the following with some of your colleagues:

- What messages are you personally most drawn to?
- What type of communication do you typically use to communicate with others?
- Now consider your program and its common core messages. Identify whether they are currently Ethos, Pathos, or Logos. What do you observe is your organization's communication preference?
- Consider the audiences that receive communications from your organization. Identify what types of messages the majority of people seem to respond to most consistently. What do you observe is your audience's preference?

Identify the best balance for you and your organization. Be authentic with who you are and don't cater entirely to the audience. Be flexible about how to engage different types of people. To practice this, you can try the following to implement strategic communication:

- Draft three statements or sentences that can reflect the three different appeals for your program. Practice with people who you are pretty sure what their preference may be.
- Look at your website language. What type of appeal is centered? Do any changes need to be made?

## C. How to tell a story

The first step is get clear about your organization's purpose, desired impact, and goals in order to be able to create clear and compelling materials as a nonprofit (for funders, clients, etc). If this work hasn't been done, none of your stories are going to be impactful. Once you're sure on this, each story you tell about your organization should try and hit those points, and there are few guidelines you should follow:

### Beginning, middle, end

The same lessons you learned in school still stand for story telling for your nonprofit. Make sure your story introduces the people, organizations, and facts that the reader needs to know. Use the middle to flesh out the problem and approaching the solution, and use the end for showing how your nonprofit helped solve the challenge. For example, in a case study or fundraising story the progression could be - "challenge", "what we did", and "outcome".

### Use real people, and add detail

Stories about (not based on) real people, situations, or problems make the most compelling read. If appropriate, use people's names and locations so that readers can imagine a person and place. If you have any special details - like a family taking in a pet that needed a home even though they were on a limited income, or the words someone used when they were able to be part of your program - these sorts of things also make it more tangible, humanizing, and relatable for the reader.

### But still use simple, concise language

People don't have long attention spans, so make sure you are giving them only the information they need to know to make a decision, in words they can read easily and concepts they understand. Don't use internal jargon that only people in your organization or bubble would know. Every time you want to include a sentence or extra word, ask yourself if the reader really needs to know that.

### Ensure your nonprofit has offered the solution in the story

See "Beginning, middle, end" above to where this fits in the story. If your organization isn't playing a role in the story, then you should stop and ask yourself why are you telling it.

### Important note

Critical to telling a meaningful and impactful story is ensuring that the individuals who are the subjects of that story give you permission to tell it. Remember that the story is *their* story and therefore their consent and comfortability is what is most important.



## *Response*

Think of a success story that might resonate with your stakeholders. Who are the key subjects of the story? What makes the story a success? What did you or your program do to contribute to the success?

Share the story with a colleague. Invite feedback on what was most compelling about the story and what could be improved in the delivery.



## *Initial Implementation Steps*

Designate a time where you and some colleagues can gather together to share some success stories about your respective work, perhaps during a staff meeting. Brainstorm a list of successes and then ask individuals to share specifics about a few stories of which they are particularly proud.

Invite questions and feedback on how the story can be clarified, fleshed out, and/or strengthened. As a group, consider what stakeholder group(s) would be interested in learning about the success(es) and think about how the story could be shared with them.

## D. How to effectively use images

### FOLLOW THESE PRINCIPLES WHEN USING IMAGES FOR COMMUNICATING YOUR MESSAGE:

- Always use a sharp, and in-focus image. You can take these on smart phones these days, but ensure you still take the time to focus and align the image before taking the picture
- The image should be focused on the subject. Remember that PFL always includes both the person and the pet together to celebrate the human-animal bond. Crop out extra parts of the shot that do not need to be seen, like a lot of ceiling or dead space around the subject. Also be mindful of the background, making sure you're not including anything that might make the person feel uncomfortable.
- Make sure the image you are using is in some way connected to your nonprofit and your mission. A picture of a happy child is great, but how can you connect that with your mission and what you do? Similarly, taking a picture of just a dog or cat without the person who cares for them doesn't tell the complete story.
- Sometimes it is helpful to notice the colors in the image you are going to use. Do they tie-in or complement the colors of your brand, of the campaign you are running, or the poster you have designed? Would it be more beneficial if the photo was horizontal or vertical? It can be easier on the eye of the reader if everything flows or complements each other, which means they are more likely to take in the content of your marketing piece.



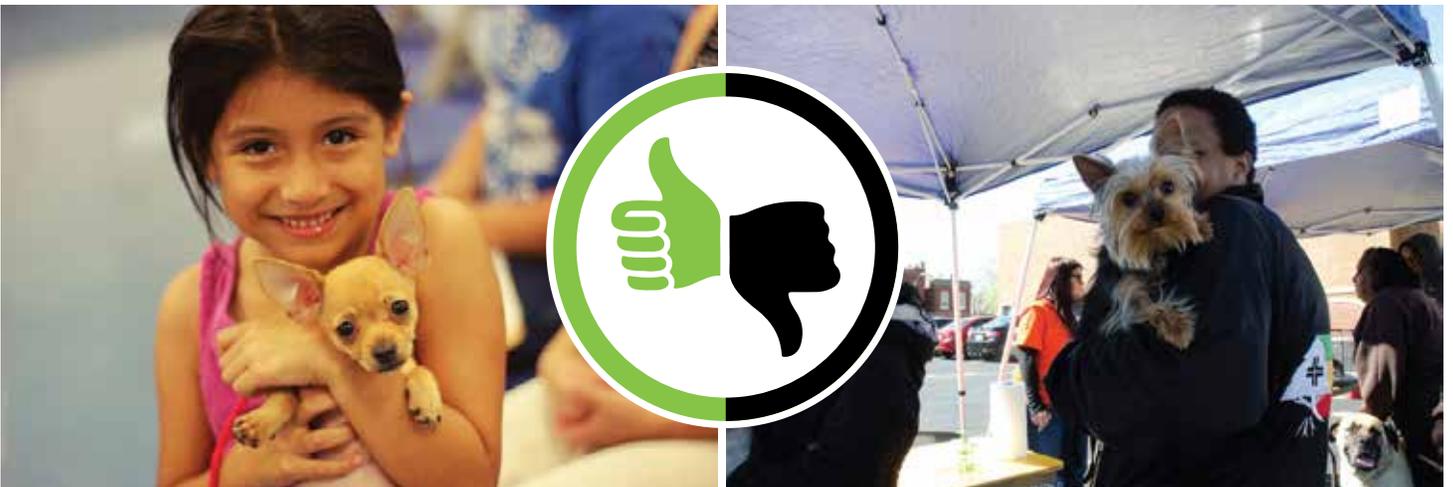
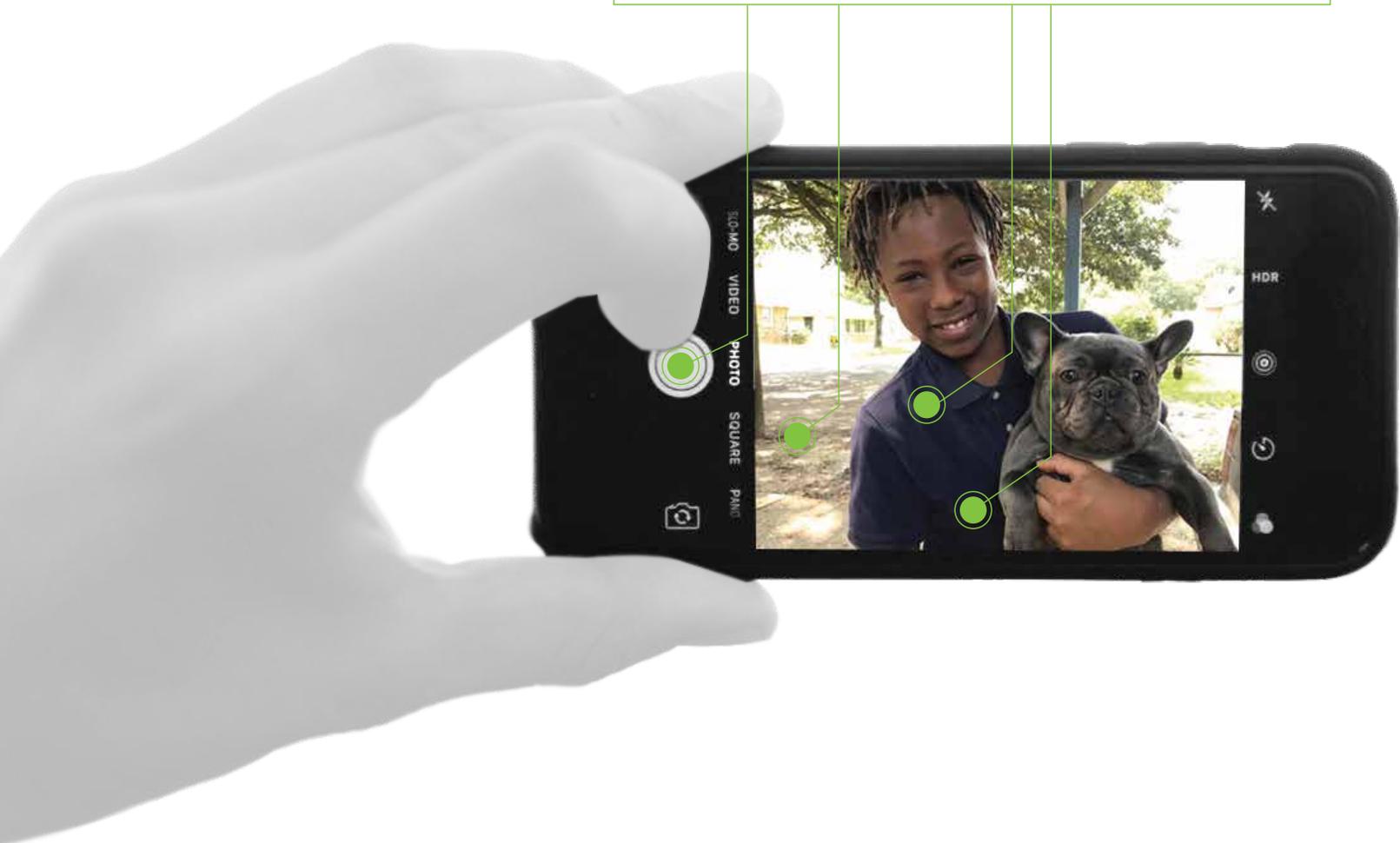
## ADDITIONAL PHOTOGRAPHY TIPS

### Things to keep in mind:

- Always be polite and ask permission
- Photograph the person and pet together
- Focus on the human-animal bond
- Include the person in plans to use the pic
- Schedule ambassador visits if needed
- Upload/organize pics on your computer
- Offer to text/email the pic to the client

### Getting the shot:

- Hold the camera horizontally and around eye level  
*(Vertical is good too but harder to use when added to video)*
- Play with proximity, moving closer and further back
- Be mindful of distracting or unwanted background
- Try to avoid very dark shadows and bright highlights
- Get both the person and pet to look at the camera  
*(Embarrassing “pew pew” sound effects may be required)*
- Snap multiple pics, too many are better than too few



## *Response*

Pull up the last image that you used in your communications. It could have been in your email, an annual report, or a conference presentation.

Review that image against the aforementioned principles. To what extent, does that image uphold those principles?

How could it be improved?



## *Initial Implementation Steps*

Consider how communications regarding your PFL work could benefit from the use of images. Invite a small group of colleagues to come together to brainstorm images that could be most effective for the outlined purpose.

Gather the images and review them against the aforementioned principles. Slowly begin to integrate these principles into your everyday use of images in your program and organization.



## *E. How to develop a social media strategy*

Start with a social media policy which covers how social media is used by staff inside and outside of work, and by whom the organizational social media platforms are used. You can use these section headings to cover all the necessary info.

- Policy statement (why does this statement exist and what is it for)
- Introduction (introduction to social media and why it is important to have a policy that covers it)
- Standards (the bulk of the policy and what you will hold everyone to)
- To whom the standards apply (including freelance staff and contractors)
- Consequences of breach
- Responsibility of those operating corporate accounts (what particular responsibilities they need to meet, in addition to the regular standards above)



## THE SOCIAL MEDIA STRATEGY SHOULD CONSIST OF:

**Goals:** Your social media presence and activity *could* achieve a multitude of things (attracting new donors, encouraging greater understanding of systemic poverty and inequity, advocating for the community you serve, etc.), but it likely won't achieve everything, especially if you are using it to try and achieve everything. Pick the three main things that you want social media to achieve and use these as the guide for everything that you post. If a post doesn't lend itself to one of these aims, then your social media presence may not be the place for that message. You should also use the goals for the tangible indicators like how much you want to grow or how much engagement you want with your posts or your audience.

**Progress indicators:** Use this to list metrics you want to keep track of in relation to your goals. Want to increase your followers? Set an indicator of a 10% increase in followers each month or quarter. Or if you want high engagement, set your engagement growth indicators by month or quarter. This will help you to know if you're being successful.

**Progress methods:** Use this section to list the tactics and rules around how often you will post. For example, you could set a rule of posting three times a day, or three times a week in order to reach your goals. You can also set guidelines for the types and breakdown of the things you will post. This entails listing what percentage of your posts will be self promotion, what percentage will be community updates or information sharing, what percentage will be funny or light-hearted posts, or what percentage of posts will be lifting up the voices of your clients or community.

**Social media guidelines for key topics:** You may want to set some special guidelines for how often you post about specific themes in your work, such as an individual client stories, general posts about systemic poverty, in-kind donation asks, etc.

It is also worth creating a 'persona' for your social media voice. The persona might be the same one as you'd use in a newsletter, press release, official notice about changes to your workplace, or it could have its own personality just for social media. This can help with not only a consistent tone on social media, but also if multiple people are managing the account it will help the social media brand voice be consistent.

## *Response*

Reflect on your organization's current use of social media. Where in the social media landscape are you present (e.g. Twitter, Facebook, Instagram, etc.)? Where are you most active? Does the organization have a clear social media strategy?

Reach out to the person on staff who is either responsible for managing the organization's social media presence or most active on social media on behalf of the organization. Learn more about what policies and protocols currently exist and get a better sense of what the organization's interest and appetite is for strengthening its use of social media for advancing the PFL mission.



## *Initial Implementation Steps*

Facilitate a discussion with a group of colleagues to brainstorm possible goals for what your social media presence could help you achieve. Identify the top three goals and outline what key resources would be needed in order to make progress against that goal.



# CHAPTER 4:

# Effective Fundraising

## Overview

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The chapter you've all been waiting for! You can't run a program if you don't have money for it. However the real driver of success is having a strong program. Because you have considered the logic, messaging and philosophy around PFL, it will be easier for people to grasp what they are giving toward and the impact of their donations. This chapter looks more specifically at the context around fundraising as well as how to gain access to new or existing sources of funds to financially support the program. There are three sections included:

### **Understanding the Funding Landscape**

- A. The importance of diversifying your funding
- B. How to identify prospective donors
- C. How to cultivate your individual donor base

### **Fundamentals of Fundraising**

- A. How to write an effective proposal
- B. How to make a pitch
- C. How to organize a giving campaign
- D. How to effectively manage a donor database
- E. How to innovate in development

### **Making Sense of the Numbers**

- A. How to collect and use data meaningfully for fundraising
- B. How to build support into your budget

## *Keep in Mind*

Effective fundraising is both an art and a science. The ability to craft a compelling story and identify untapped opportunities is as critical as managing a robust donor database and organizing an annual fundraising appeal. These efforts all require clarity, intention, and some imagination in order to be successful. While we recognize that the kind of organization you are can dictate the sources of your funding (e.g. municipal agencies receive the majority if not all of its funding from the government), this chapter focuses on general strategies for diversifying your donor base so that your organization is not overly reliant on a few sources for support. Given the nature of funding for the animal welfare field, the suggested fundraising strategies and approaches are also geared towards opportunities in raising money from individuals and foundations.



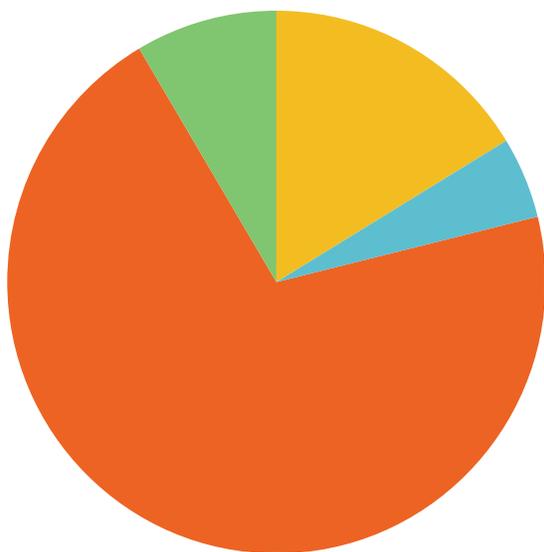


## UNDERSTANDING THE FUNDING LANDSCAPE

### A. *The importance of diversifying your funding*

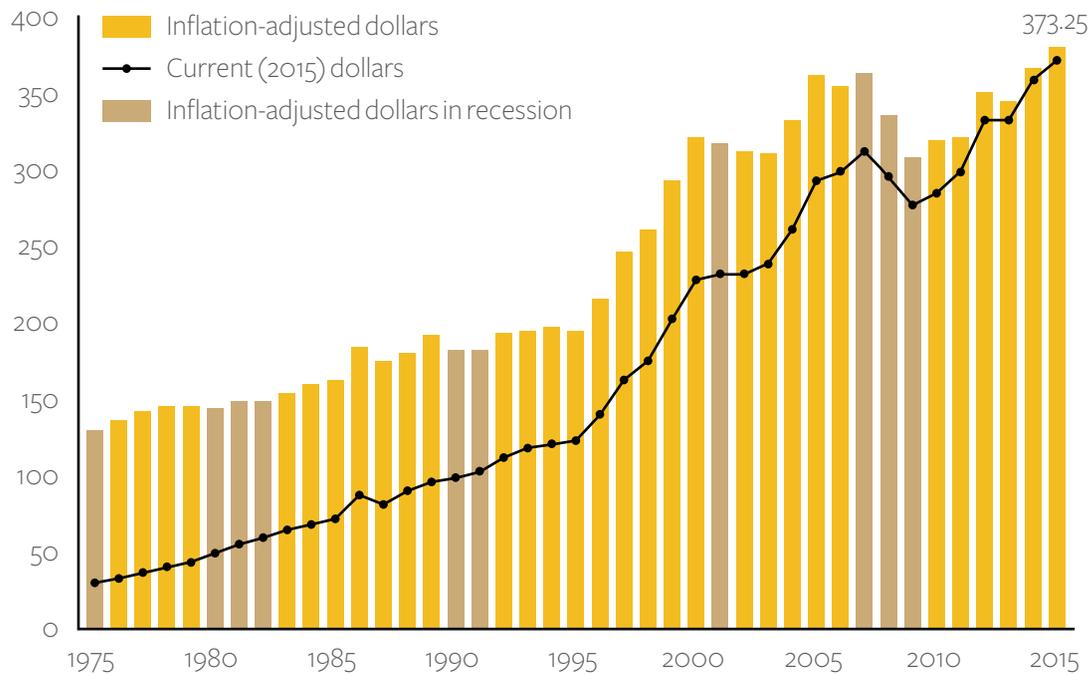
Fundraising is about two things: building relationships and asking for support. Therefore, to be better at fundraising, we must build stronger relationships and ask more, ask better and ask smarter. However, to target these efforts effectively, it is important to understand the context around the various sources of funding. Let's consider the private sector – foundations, corporations, individuals, and bequests. In 2017, \$410.02 billion was contributed to nonprofits by the private sector. See the chart below to see where the money came from.

**Sources of Donations**



- Individuals = \$286,650,000,000 (70%)
- Foundations = \$66,900,000,000 (16%)
- Bequests = \$35,700,000,000 (9%)
- Corporations = \$20,770,000,000 (5%)

### Total U.S. Giving: 1975-2015 (in billions of dollars)



As indicated in these charts, individuals have historically given more than the other areas in the private sector. So, who are these individuals? Where does most money come from? The answer is most people. Everyone gives, not just rich people. What are the commonalities of these people? There are virtually *none*, except:

- 82% of money given is by households, which have an income less than \$60,000/year.
- According to some reports, poor and working class tend to give more as percentage of household income than upper-middle class and wealthy. Why? Likely because they can understand the need better. What people have is not necessarily an indication of what they give!
- Consider the “Generosity Index” – it’s a gimmicky stat that takes per capita giving to per capita income. What state has come out on top 8 times? The answer is Mississippi (New York is somewhere in the bottom 50%, as is most of the Northeast). Mississippi is 47 in per capita income but tops in per capita giving. Why? Churches get a lot of the money, and Mississippi is in the Bible Belt.
- Let’s take a look at the stats on where the money went in 2016:

CATEGORY	DOLLAR AMOUNT	PERCENTAGE
<b>Religion</b>	\$ 122.9	31.4 %
<b>Education</b>	\$ 59.8	15.3 %
<b>Human Services</b>	\$ 46.8	12.0 %
<b>Grant-Making Institutions</b>	\$ 40.6	10.4 %
<b>Health</b>	\$ 33.1	8.5 %
<b>Public-Society Benefit</b>	\$ 29.9	7.6 %
<b>International Affairs</b>	\$ 22.0	5.6 %
<b>Arts, Culture, Humanities</b>	\$ 18.2	4.7 %
<b>Environment/Animals</b>	\$ 11.1	2.8 %
<b>Foundation Grants to Individuals</b>	\$ 7.1	1.8 %

While the case may be clear for considering a more robust individual donor strategy, your organization may also be well-positioned to consider funding opportunities from foundations, corporations, and/or government. Below are some key characteristics about each source of funding.

TYPE OF GIVING	CHARACTERISTICS
<b>Individual</b>	<ul style="list-style-type: none"> <li>● 8-9 households out of 10 give</li> <li>● Market influences higher income brackets</li> <li>● Employment influences lower income brackets</li> <li>● Individuals still most resilient part of sector</li> <li>● Limited “donor exhaustion” (so far)</li> <li>● Increasing challenges in reaching Millennials</li> </ul>
<b>Foundations</b>	<ul style="list-style-type: none"> <li>● Lags the economy 18-24 months</li> <li>● Strong economy boosted endowments</li> <li>● But still some nervousness about economy</li> <li>● Bigger embrace of mission-related investing</li> <li>● Probably modest increases in 2019 giving</li> <li>● Multi-year or capital grants still limited</li> <li>● What will be responses to proposed federal cuts, politics, world events, political elections?</li> </ul>
<b>Corporations</b>	<ul style="list-style-type: none"> <li>● Sensitive to market changes</li> <li>● 2<sup>nd</sup> longest bull market in history</li> <li>● Optimism about government’s proposals to decrease tax rate</li> <li>● But uneasiness about world events and politics</li> <li>● Federal Reserve raising interest rates</li> <li>● Not all cash, especially in recent past</li> <li>● Probably limited change in giving in 2019</li> </ul>
<b>Government</b>	<ul style="list-style-type: none"> <li>● Government funding lags economy 6-12 months</li> <li>● Well beyond Great Recession but not all governments experienced boon of bull market</li> <li>● Big questions in potentially turbulent times</li> <li>● Big social service cuts in proposed federal budget</li> <li>● Impact of “sanctuary city” status?</li> <li>● Unsure consequences of political elections</li> <li>● Increased push towards performance- and outcome-based grants</li> </ul>

The main point of understanding the various resources and their dynamics is to know that if you rely on only one source of income, your organization is more at risk of losing that support. Support changes based on what is going on in the economy. Therefore, it’s important to spread out the money into different sources so that when the economy changes, your organization doesn’t lose everything.

## Response

Gather information about your current funding sources.

- What sources are you most reliant on?
- Where are there opportunities to grow more support?



## Initial Implementation Steps

Assemble a small group of colleagues, including those in your development team, and review your current funding sources together. Consider the following questions:

- What are the reasons for the current variety (or lack thereof) of funding sources? Based on those reasons, what are the strengths and risks highlighted within the organization?
- What are some new sources of funding that your organization should explore?



## *B. How to identify prospective donors*

Remember, fundraising is ultimately about two things – building relationships and asking. The key to identifying your prospective donors is to assess the relationships around you and how they might be involved. This involves building the essential skill of networking. Too often networking feels like an unpleasant task of trading favors with strangers. It feels insincere or manipulative - at best, an elegant way of using people.

### **BUILDING RELATIONSHIPS – YOUR NETWORK**

In contrast, building your network at its best is meant to be much more dynamic. Networking is creating a fabric of personal contacts who will provide support, feedback, insight, resources, and information.

Networking is meant to be relational rather than transactional. Begin with “friend-raising.” Friend-raising is the precursor to fundraising – it is focused on educating your donor about your work, and making them excited and invested.

So who are your stakeholders? These are the people or entities that have an affect on your work and /or that are affected by your work.

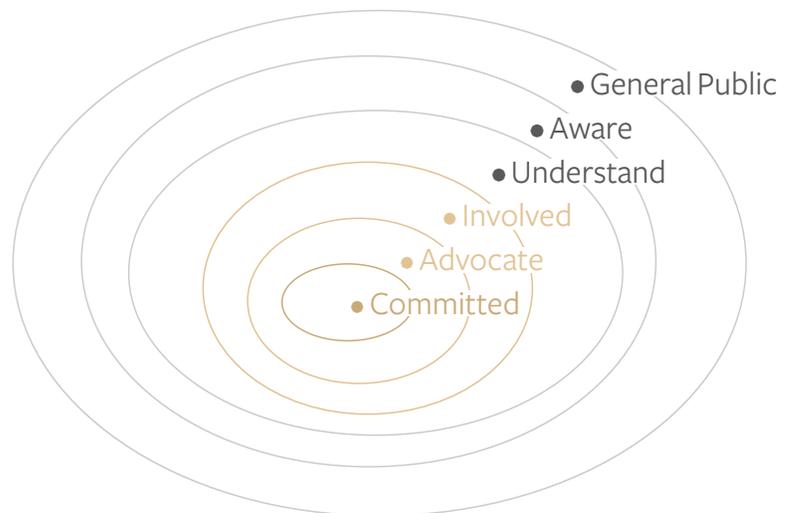
- **Naming:** Who impacts (or is impacted by) you work? What power do they have to help and impede your work?
- **Mapping:** What is the nature of your current relationship with these stakeholders?
- **Strategizing:** What is the nature of your desired relationship, and how do you get to that desired state?

In the response section, you can take some time to proactively work through these tips.





To help you understand more around mapping and strategizing, here is a framework for considering how to segment your audience and consider the interests of each group.



- **AWARE:** People who are aware that you exist; they've heard of your organization before (but probably can't say what you do exactly)
- **UNDERSTAND:** People who understand something about your organization, your mission, and/or your work
- **INVOLVED:** People who are involved, in some way, with your organization; maybe they're on a mailing list or they attended an event
- **ADVOCATE:** People who are willing to talk positively about your organization to someone else; maybe even ask for money on your behalf
- **COMMITTED:** People who are willing to do whatever they can to help the organization succeed; ideally, your staff, board, core volunteers, and major donors

Ask “Where is your audience in relation to you?” and focus on movement to the next segment of the circle, not jumping segments or jumping to the inner circle. This helps us to be more targeted about what we want or need from our audience.

### Consider these key success factors for identifying prospective partnerships with donors:

- Common purpose
- Engages self-interest
- Trust
- Clear working agreements
- Accountability
- Sufficient organizational capacity
- Readiness
- Financial resources

## *Response*

The main key in identifying prospective donors is helping your audience move closer to being committed to the organization.

Name and map your audience, write down the names of stakeholders, and identify which of the segmented circles they are currently in.



## *Initial Implementation Steps*

With colleagues determine how you might move your audience more toward a donor partnership.

- What is the nature of our desired relationship and how do we get to that desired state?
- What next steps can you take to move the identified person to the next rung of the circle?
- Who will be responsible for advancing the strategies?



## C. How to cultivate your individual donor base

Establish a donor journey. Here is an image of what a sample donor journey might look like:



For the initial introduction or visit to see the program in action, you may include creating a handout with key facts about the program, your business card, and anything else that will help them understand PFL. When you feel the time is right during or toward the end of the initial introduction, ask them what they think about the program and how they see themselves becoming involved.

Ask them for a specific donation. Pause – do not make excuses for asking. Just let them respond. And depending on how they answer, you can respond in different ways:

- *If they say yes:* thank them and ask how they want you to follow up.
- *If they say they will think about it:* thank them and ask what additional information, if any, will help them decide.
- *If they say no:* thank them, and ask if you can keep them informed of the progress of the program and continue inviting them to other events.

## Response

Think of a recent new donor. Consider their journey with your organization.

- What did it look like?
- How did you or your organization support the individual through their journey?
- At what point did they decide to give?



## Initial Implementation Steps

Start constructing your fundraising plan and timeline. A general rule of thumb is to know what you need and build from what you have. Your plan includes when you will reach out to current donors to thank them and nurture / continue that relationship. Here are some key next steps:

- Assign relationship responsibilities for yourself, your board, and any key volunteers wanting to help with fundraising.
- Set a calendar for annual friend-raising events, including personal check-ins and general donor updates.
- Schedule time on your calendar to ask again and again: Who is around you, who do you have access to?

Reference the template below to start building out your plan:

PROGRAM / OPERATIONAL NEED	FUNDRAISING ACTIVITY	FUNDRAISING ACTIVITY TIMELINE	FUNDRAISING GOAL	LEAD PERSON



# FUNDAMENTALS OF FUNDRAISING

## A. *How to write an effective proposal*

First, let's look at some of the context around foundations and the proposal process.

### TYPES OF FOUNDATIONS

- **PRIVATE FOUNDATIONS** (funds from a single source)
  - **Independent** (i.e. New York Foundation, Ford) – The bulk of foundations.
  - **Family** (i.e. Daphne Foundation) – Independent foundations whose assets come from the members of a single family. However, there are no standard definitions of a family foundation. Generally, family members are usually board members or trustees and play an important role in grantmaking decisions. Nat'l Center for Family Philanthropy says almost half of private foundations are family foundations, and 90% of them have assets of less than \$10 million. (5% = <\$500,00) (Daphne, Albert List, maybe Bill and Belinda Gates)
  - **Corporate** (i.e. Toyota USA Foundation, Liz Claiborne) – Assets come from a for-profit company.
  - **Operating** (i.e. Panasonic Foundation, Century Foundation) – Conducts research and carries out social welfare or other charitable programs. Might give grants but most of the funds are used for its own programs and operation.
- **PUBLIC FOUNDATIONS** (funds from multiple sources)
  - **Public Charity** (i.e. NY Women's Foundation, Headwaters Foundation) – Receives funds from many donors. Usually defines communities in ways other than geographic (like women or environment).
  - **Community** (i.e. NY Community Trust, Hawaii Community Foundation) – Type of public charity usually set up through donor-advised funds. Makes grants in a specific region.

It is important to know that grants are not fast money. They are made formally by approval of the foundation's board of directors or trustees. Typically, board meetings are twice a year, typically in the spring and fall. Some boards meet four times a year. Working backwards, let's see what a timeline could look like:

- May - July — You receive the grant
- May — Board meeting
- April — Program Officer prepares docket to present to Board for approval
- February - March — Program Officers screen proposals, perhaps an on-site visit
- January — Receive your Letter of Inquiry
- September - December — You are researching foundations

The process can take a year, which means that research, planning, and organization are key.

You'll also be encountering a series of screenings in your application process.

### **Screen 1 – Submit Letter of Inquiry**

- a. Is the proposed program within the foundation's funding interests?
- b. Is it interesting?
- c. Did it meet the deadline?

### **Screen 2 – Submit a Full Proposal**

- a. This screening could be done by any staff of the foundation, though it probably does not involve a program officer.
- b. Did it meet the deadline?
- c. Is it complete?
- d. Did it contain all the required and appropriate materials?
- e. Is it within the proposal guidelines?

*\*If you didn't pass either of the first two screens, you likely didn't do your research on the foundation or you missed basic instructions.*

### **Screen 3 – Program Officer Reads Your Proposal**

- a. Does the request fall within the broad stated program guidelines?
- b. Does it advance the foundation's interests?
- c. Is the proposal well-planned and supported?
- d. Does it request a doable / reasonable amount?
- e. Did you show strategic use of money, leveraging available resources?
- f. Is there a strong base of community support?

### **Screen 4 – Program Officer Requests Additional Information**

- a. This should be considered a success
- b. Do you have competent staff?
- c. Are there positive references for the program?
- d. Is it a well-functioning program, and how can you show that it is?
- e. Does it fill a gap, advance the field, or is it a strategic use of foundation money?

### **Screen 5 – Board Reviews Your Proposal**

- a. This screening is out of your control. You've done everything you could have done to get the grant. Now the Board will make the final decision.
- b. Does this fit within the foundation's larger strategy?



Imagine reading all these proposals:

- Foundation A received 779 proposals in one year
  - A total of 179 (23%) grants were approved
  - 44 grants (25% of funded groups; 5.6% of all requests) went to new groups
- Program Officers had 4 days to read proposals in each of 3 cycles
- This leaves about 3 – 5 minutes per proposal

### ***So how do we make our proposals stand out?***

The real driver of success is a strong program. Strong proposals may occasionally help bad programs, but **strong programs** - even with mediocre proposals - will be more successful over time.

### **SIX COMPONENTS OF EFFECTIVE FUNDRAISING:**

1. Appeals to the interests of the donor
2. Describes a compelling need or situation
3. Promotes a vision for change
4. Presents a clear solution to a need or situation
5. Conveys a confidence about your capabilities
6. Asks for a specific and justifiable amount

#### **Appeals to the interests of the donor:**

“Personalized” is better than “generic.” Know everything you can about the donor by studying and researching. Look at their website, the language they use, the organizations they’ve funded in the past and how much money they typically give away. Just because someone has money doesn’t mean they’ll give it to you. This is about asking smarter.

#### **Describes a compelling need or situation:**

Describe the scale and scope of the situation, including how individual lives are affected AND the consequences of doing nothing. Make the appeal appropriate to the donor. Be careful — don’t make the problem to be too much larger than you, or anyone, can handle.

#### **Promotes a vision for change:**

You are not “selling” the problem or solution. You are selling a vision for change. Help the donor see that something will be different after you run your program. Share with them how people’s lives will be different. Share the ideal or the dream you are pursuing.





### **Presents a clear solution to a need or situation:**

This is your plan of action. Provide measurable goals and objectives. Your plan should be feasible, realistic, and reasonable. Pay attention to your program logic.

### **Conveys a confidence about your capabilities:**

Why should a donor trust you? Remember, it's all about relationships. To help build trust through a proposal, you can:

- Show a record of accomplishment/be data-driven
- Provide information about key board members and staff
- List your affiliations and partnerships
- Talk about your volunteers
- Explain your commitment and dedication
- Show how you will know when you are successful (i.e. your evaluation plan)

### **Asks for a specific and justifiable amount:**

Be specific in your ask. Ask for a specific dollar amount directly and explicitly. "We are requesting a grant of \$25,000 from the ABC Foundation to support our Pets For Life program." Ask in the Cover Letter, Proposal Summary, and Funding Request. The trick is asking for the right amount, so make sure to research on the Foundation Center or the Foundation's website to see the range of amounts this organization gives and ask within that range.

### **THE BASIC HOW-TO:**

Proposal writing is not like essay writing. Get to the point immediately and limit your creativity. Share the most important information at the very beginning and the least important information at the end. Start with a strong topic sentence and alert the reader about what he or she is going to read. Pattern this for each sentence; each paragraph; each section. Use every sentence to make a point.



## Response

Look at the logic of your solution to the problem or situation. Answer the following questions:

**1. Target Population:**

Who are the people you are working with and for whom do you want to see change?

**2. Need or Problem:**

What are the issues/challenges/struggles that your target population faces?

**3. Strategy:**

What is your program and how does it meet the need of the target population?

**4. Outcome:**

What comes directly out of your program? What is the result of your strategy?

**5. Impact:**

What is the change the target population experiences?

You should be able to draw connections logically from 1 down through 6.

*Example:*

**1. Target Population:** Low-income immigrant families

**2. Need or Problem:** No awareness of public services

**3. Strategy:** Workshops on public services

**4. Outcome:** 50 families attend; they have increased knowledge of public services available

**5. Impact:** They access services they need





## *Initial Implementation Steps*

**Executive:** Consider who you may know at a certain foundation. Try to meet them in person. Get to know them and familiarize yourself with the program so that you can share the solution to what the people you serve are experiencing.

**Development staff:** Look through the proposals you've written so far and consider what changes you can make that will address any of the six components of effective fundraising.

Some additional resources you can look through are:

- Grassroots Fundraising Journal – published by GIFT, Grassroots Institute for Fundraising Training ([www.grassrootsfundraising.org](http://www.grassrootsfundraising.org))
- Fundraising for the Long Haul – by Kim Klein
- Guide to Proposal Writing – published by the Foundation Center ([www.foundationcenter.org](http://www.foundationcenter.org))
- Guide to Winning Proposals – published by The Foundation Center ([www.foundationcenter.org](http://www.foundationcenter.org))

**Program staff:** After looking at the logic of your program, consider the changes you need to make in order to increase the logic and support your leadership and development team in fundraising for the program. How can you make your program stronger?



## B. How to make a pitch

There are two most common types of pitches that people make – an elevator pitch or a financial pitch. The pitch you use depends on where your audience is regarding the segmented circles described in the section “*How to identify prospective donors*”. If you are speaking to someone in the General Public or the Aware categories, an elevator pitch is a great way to move them to the next rung of the circle. You can use a financial pitch for anyone from the Understand category to the Committed category.

### ELEVATOR PITCHES

Elevator pitches need to be clear, compelling, and concise. Any representative of the organization should feel prepared to use this pitch to make the most of a brief engagement to open the door for a deeper discussion.

Core components to a elevator pitch may include:

- A brief **introduction** to who you are
- **Who** does your program aim to serve (focus population)
- What **needs** of this population are you trying to address
- **How** your program is meeting the needs of your focus population



A great elevator pitch will express human impact (it answers “why should I care?”) and will generate interest in knowing more. It won’t tell the whole story but will establish a foundation for further contact. The follow up might sound like, “Can I give you my card?” or “I’d love to follow up with you to speak more.”

## FINANCIAL PITCHES

The ask for money can often be the most challenging or scary part for most people. Here are some ways to change your mindset in order to ask with confidence:

### **Prepare with excitement, not excuses**

Often we prepare excuses in anticipation of “failure” or “rejection.” Instead, shift the perspective. Think about how you can convey excitement for what someone’s contribution will do. Asking for money is actually “giving people the opportunity to make a difference.”

### **Flip the framework**

Think of it as an “investment”, not a “handout.” You are not asking for yourself but for mission and values that are commonly shared with the donor. Present an opportunity for the donor to participate. You are asking someone to join you. Use the language “would you consider?” to invite them to contribute. Then watch responses – only deep dive with people where someone seems interested in learning more.

### **Redefine “no”**

Be direct and don’t read what may not be there. Learn to accept “no” as a reasonable answer and ask for feedback about what’s behind the “no”. “No” might mean not now. Try not to take a “no” personally.

### **Failure would only be the failure to ask**

People follow confidence – be confident. You will never get what you don’t ask for, and often times people are happy to give when asked. When it’s a relationship rather than a transaction, it becomes an opportunity to be a part of the greater mission.

Going deeper with your current revenue base is the best way to increase funding. Asking people or foundations who are already funding you to give more will be easier than getting a stranger to give. Quick tips for increasing individual giving:

- Meetings are the best way to secure funding, in-person conversations.
- Never say “whatever you can do to help,” since donors will likely give the smallest amount.
- Use the language “towards supporting X” to avoid restricting funding.
- Consider incremental increases. You can ask an individual giving \$5 to consider giving \$25 or you can ask an individual giving \$25 to consider giving \$50. Major gifts take 2-5 years to cultivate.
- Engage your board.

## Response

Write out your elevator pitch. Make sure to include the key points and clear language. Here is an example elevator pitch to get you started:

*Hi. I'm \_\_\_\_\_, and I am [fill in the blank with title/role] at [organization]. At [organization], we're committed to addressing inequity and lack of access to pet resources people experience in our area's most underserved communities, working hand-in-hand with the people we serve to meet their needs.*

*We also strive to understand the challenges our community members face, recognizing that a love for pets transcends socio-economic boundaries. It's our belief that no one should be denied the opportunity to experience the joy and comfort that comes from the human-animal bond.*

*I'd love to tell you about [insert relevant success story.]*

OR

*Can I connect you with [insert program staff person] who can give you more information about how we are providing resources to keep pets happy and healthy in their loving homes?*

Once you have written your elevator pitch, read it out loud and time it. Try to get it down to 30 seconds. Role play your elevator pitch with a colleague. Invite feedback on what worked well and what can be improved. Or practice your pitch with a friend who is not really involved with the program. Ask them for feedback: is the ask clear? The impact compelling? Anything you should change about the delivery? Refine your pitch and practice, practice, practice!

Next, write out your financial pitch. Express the impact that their donation or contribution will have on the pets AND humans! Think about what in particular you would like to ask for.

Be specific. Help move them closer and closer to the inner commitment circle, but don't expect them to jump levels.



## Initial Implementation Steps

Facilitate a discussion with a small group of colleagues around some core talking points for your PFL program. Identify one key stakeholder group (e.g. new/existing donors, government official, volunteer, board member, staff, partner, etc.). Brainstorm and prioritize the top 3-5 talking points that should be considered whenever anyone on staff is engaging that particular stakeholder group.



## C. *How to organize a giving campaign*

A well thought out, strategic giving campaign is a way to include others in the work that your organization or program is doing, and its main purpose is to include as many people as possible. Here are some steps to consider when developing a giving campaign:

- 1.** Name your campaign. It will make it easier to talk about with your network, and easier to spread the word.
- 2.** Identify your fundraising goal. It can be helpful to get others to contribute when they know they are helping make progress toward your goal.
- 3.** Identify a desired contribution to get people involved. Consider giving a smaller amount in order to bring more people in – even those who do not make a lot of money.
- 4.** Ask friends, family, or members of your network to donate the desired contribution to your campaign, and encourage them to spread the word about the campaign to their friends. The idea is to get as many people as possible emotionally engaged with your work and then ask them for that desired contribution — it’s a small ask and it’s easy and fun!
- 5.** Provide a timeline for members of your campaign to ask people they know for donations (through email or social media—and give people the option to personalize their ask. Give sample emails and Facebook / Twitter posts people can use to help spread the word!)
- 6.** Decide on an end date for your campaign.

These campaigns are often great ways to engage high-end donors to contribute a matching donation grant. Ask someone on your Board if there is anyone they think would be willing to match donations for your campaign. Even if there is a cap on their matching donation, at least it will motivate more people to give, and people to give more.



## *Response*

First ask the question: Is a strategic giving campaign right for you? Would it help your program and align with your fundraising plan? This is just one example of a strategy, and may not be the right strategy for you.

Ask the people who are committed supporters of your organization if they would be interested in this opportunity. Engage your board, your volunteers, etc. That way when you roll out the campaign, this is not the first time people are hearing about it. This will help the campaign to gain momentum when you officially start it.



## *Initial Implementation Steps*

Go through the list of steps to consider in developing a campaign and start developing.

After your campaign, make sure to get feedback from others about what went well and what they would change in the future. Ideally, this can be an annual campaign that more and more people are involved in and your fundraising target can grow each year.

## D. How to effectively manage a donor database

Donor databases can be overwhelming and confusing. There are so many different databases out there and it is difficult to know which one will work for you. Here are some guidelines you can use to identify what is the best donor database for your organization.

**1. Remember:** Donor databases are not perfect. Each of them have their pros and cons. Identify what your needs are based on who is in your donor network and choose the database that best meets your needs.

**2. Protect your data:** Many people use Microsoft Excel to track their donors and this spreadsheet is not locked, sent around to multiple emails, and can easily be found and opened by anyone who has access to a computer at your organization. Donors want their information protected, and it is the responsibility of the organization to do so. Make sure whatever database you pick will be able to protect your data.

**3. Reports:** Databases will give you reports that can help you in moving on your fundraising plan. Make sure to look at the various reports these donor databases will give and if they meet your reporting needs.

### *Response*

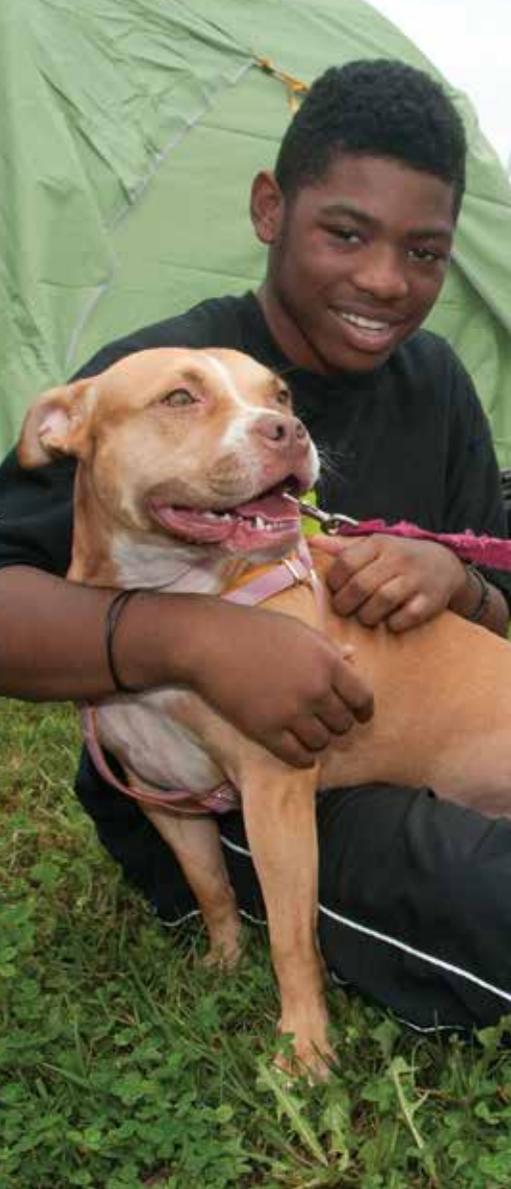
Identify what your needs are regarding your donor database. What reports will you need for your board? What reports will help you to grow your donor database?

Visit [www.tinyurl.com/Y4QF7KNZ](http://www.tinyurl.com/Y4QF7KNZ) to find out what your top 10 donor management softwares could be. It takes into account the type of organization, number of staff, annual operating budget, and constituents in order to give a more accurate estimate of the different options that could work for you.



### *Initial Implementation Steps*

Call a couple of options and shop around. List out the pros and cons of a few different options and make a decision with you fundraising staff and/or your board.



## *E. How to innovate in development*

Often times, when thinking about fundraising an organization may focus most of its energy at the beginning, courting a prospective donor. Then once the check is written, the organization pats itself on the back, carries on with its work, and then re-engages during the next annual appeal. Similar to how one may conduct a community assessment to better understand a community need, fundraisers and development staff could apply a similar approach by using a stakeholder journey map to better understand the motivations and experiences of new and existing donors for the purposes of deepening their engagement with the organization.

A **Stakeholder Journey Map** allows you to visualize a stakeholder's experience from beginning to end. This simple framework will help you more easily imagine the entire flow of your stakeholder's experience with the issue concerned - whether it's how a program/initiative or experience may work for them or all the touchpoints they have with the issue from the time before they even decide to engage to the point at which they disengage. A Stakeholder Journey Map doesn't need to be an in-depth, detailed representation of everything that happens but rather a snapshot of how a process unfolds at a high level, from that stakeholder's perspective.

Think about your stakeholder's journey from the first point of awareness of your organization or program to their first and returning interactions with the issue. Why do they first "engage"? What motivates them to "sign up" and "stay on"? How will they tell other people about it?



## PHASES OF A STAKEHOLDER JOURNEY MAP:

### Entice:

- How does your stakeholder first hear or learn about your organization or program?
- What is your stakeholder experiencing before embarking on the experience with you?

### Enter:

- What is the first interaction your stakeholder may have with your organization before “donating” or becoming a part of a program/initiative? Who do they talk to, where?
- Where is your stakeholder and what is happening when they begin the experience?

### Engage:

- What does your stakeholder gain through any program/initiative you provide? What individuals or systems are they interacting with? What are the highlights and challenges?
- What is your stakeholder’s first or sustained experience of the issue? What individuals or systems are they interacting with? What are the highlights and challenges?

### Exit:

- How does your stakeholder leave your program or organization? Do they “drop out” early? Is there a formal evaluation at that stage? Who do they talk to, where?
- How does your stakeholder end the experience or leave the situation? What happens at that point?

### Extend:

- How does your stakeholder stay engaged with your program or organization? What do they say to others about your program or organization? Will they re-engage with your organization in any way?
- How does your stakeholder repeat, sustain, or change the experience concerned? What do they say to others about it?

## Response

Identify a new or existing donor. Based on your knowledge of them and their experiences, create a preliminary Stakeholder Journey Map answering the questions at each phase.

Try your best to answer the questions from their perspective, noting both positive and negative thoughts and/or experiences of the individual. Review the Stakeholder Journey Map and take note of any new insights about the donor after completing the exercise.



## Initial Implementation Steps

Share your preliminary Stakeholder Journey Map with a small group of colleagues and invite additional input based on any new knowledge of the donor and their experiences that others may have.

Based on the insights, brainstorm possible ideas that might address some of the negative experiences and enhance some of the positive experiences of the donor. Challenge yourselves to come up with ideas at every phase of the journey to recognize the full length of a donor's potential engagement with your organization.



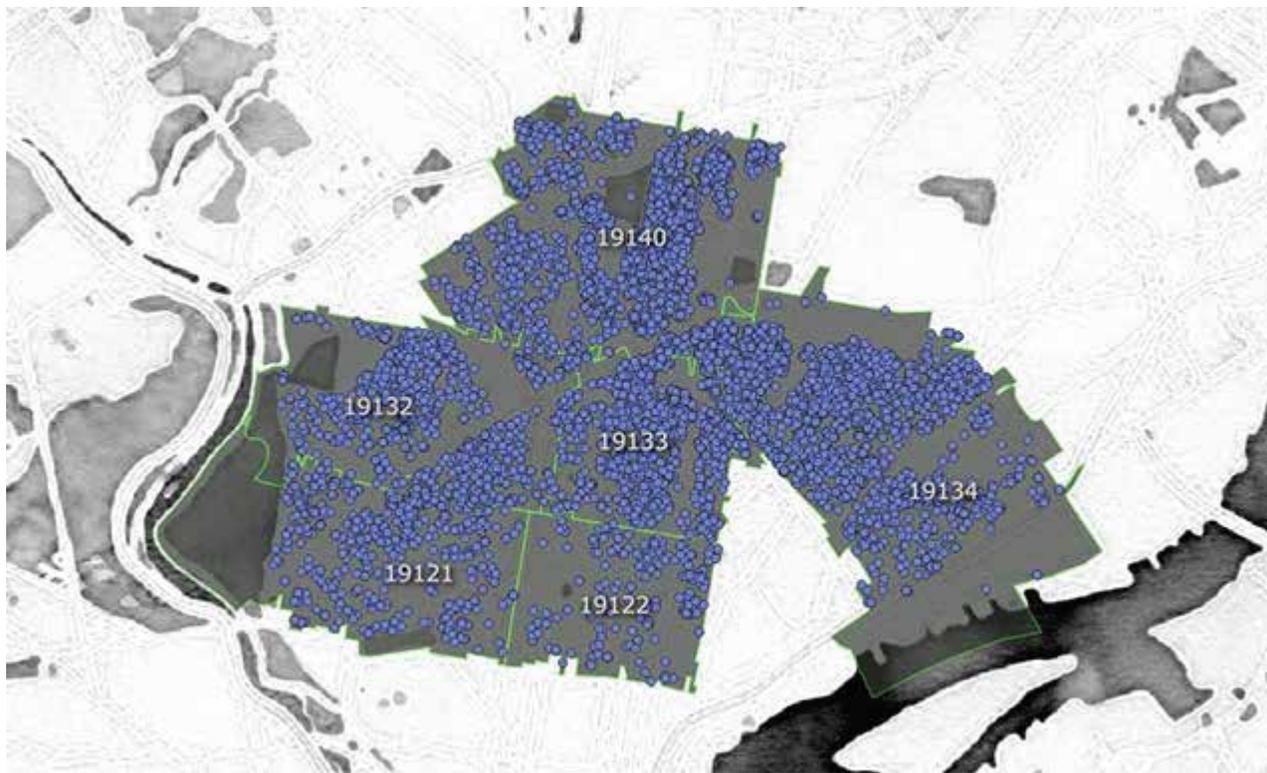
## MAKING SENSE OF THE NUMBERS

### *A. How to collect and use data meaningfully for fundraising*

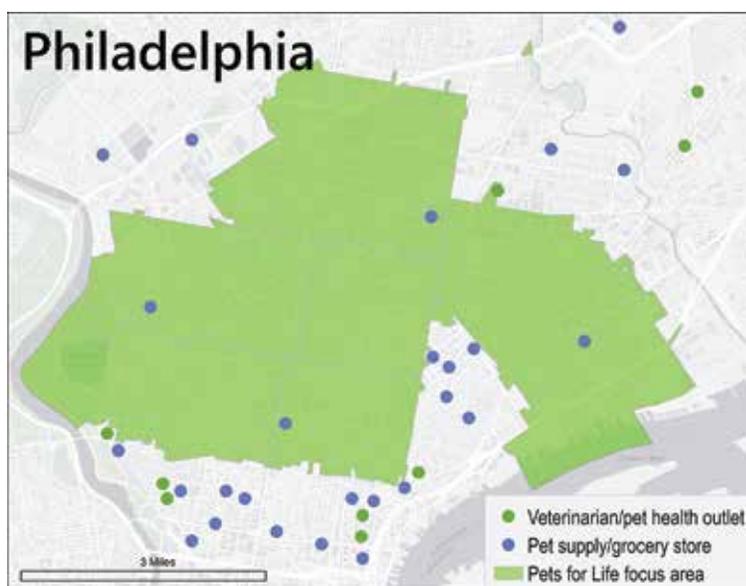
In Chapter 3 you read about the various pieces of program data that are important to gather. Some of this data will come from your community assessment and a deeper investigation of your program focus area that you can collect through various avenues, such as local articles, statistics from a public information officer or other professional, and websites listing census tract data or other pertinent and accurate sources. Other metrics specific to your direct care work will come from your use of the PFL online database or other data collection methods.

While the data itself is incredibly valuable in showcasing the impact of your outreach program, it is essential to be able to communicate this information to supporters in a compelling, easy-to-understand manner that tells the story you want to tell. It is best to express program data in a visual way and in a format that can be shared consistently across a number of different channels, such as online, social media, and via printed materials and emails. You want to be able to share your vital work far and wide in a way that grabs people's attention and appeals to data-driven donors who invest in strategic impact and outcome-driven programming!

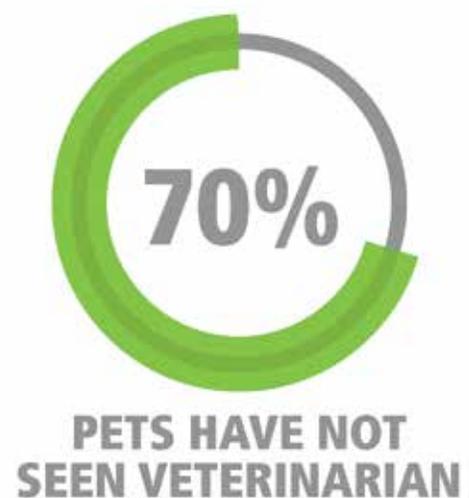
For instance, the saturation map example below illustrates the concentration of pets served in the PFL market of Philadelphia. A visual like this, created using information generated from the PFL database, tells the unique story of how the PFL outreach model is uncompromisingly thoughtful and deliberate in engaging an entire community in a methodical, sustainable way over time. These saturation maps can chart program data such as locations of pets served or spays/neuters completed and can assist in explaining to donors in a concrete, digestible way how strategic and impactful your outreach efforts are.



Here are a few other types of graphs used often to explain different aspect of the program:



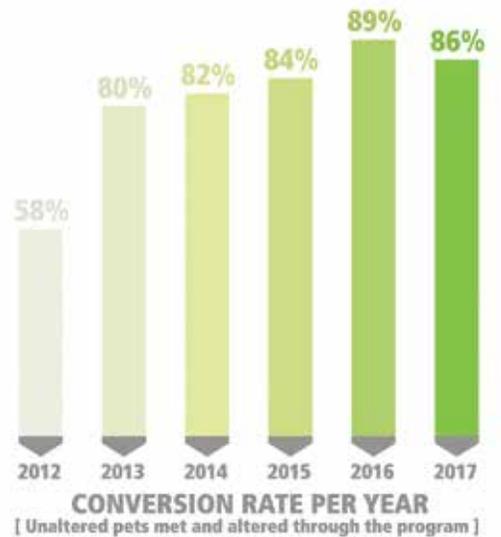
Creating a resource map, illustrating how the area of focus is a pet resource desert (lacking veterinary offices, pet supply stores, etc.), is a strong, visual way to communicate how isolated pet owners are from the resources they need and want.



Metrics, such as how few pets have been to a veterinarian prior to the PFL program connecting with them, tells the compelling story of the disconnect between service providers and underserved communities and therefore why resources and attention should be focused these areas.



**PETS UNALTERED  
WHEN MET**



*Spay and neuter services are desired by many pet owners, regardless of the zip code in which they reside, which is why another data point PFL collects - the percent of pets in PFL focus areas that are unaltered when first met - is an additional measurement that speaks to the prevalence of pet resource deserts. While 88% of pets met through PFL are unaltered, this is due to a lack of access to services and positive engagement from service providers not a lack of interest from pet owners as evidenced by the conversion rate, which is the number of pets spayed or neutered out of all the unaltered pets met. When access to spay and neuter is offered consistently and in a positive, supportive way, people in underserved communities choose to alter their pets at high rates, proving wrong the long-held misconception that this segment of pet owners are opposed to the procedure.*



The data you share should not be limited to program-specific metrics. Part of telling your story, and the story of the community you serve, is painting a vivid picture of the challenges created by systemic poverty and social justice issues. Below are just a handful of visuals that communicate the larger institutional barriers at play in underserved communities and why they matter to your work. Note that some of these examples have been custom-designed based on researched facts while others are used as-is from other organizations and institutions. Regardless of where you lift your information, make sure the sources are credible and that you always cite them in your marketing and fundraising materials.



An eviction was filed **every four minutes** in 2016... **2.3 million** for the year

*What does this mean for pet owners? African American and Latino households are about twice as likely as white households to rent. With painfully few affordable, available rentals overall, pet friendly options are even more scarce or out of reach financially.*



On average in 2017, the U.S. had **only 35 affordable and available rental units** for every **100 extremely low-income renter households**

## Response

Consider the program data you collect and have on hand.

- How have you and others in your organization used this data to explain the program to others?
- How do the various data points add up to tell the entire story of your community outreach program?
- What might you be missing that tells an important part of your story that is currently not represented in your marketing and fundraising materials?



## Initial Implementation Steps

In a small group of coworkers who are familiar with your outreach program. Assign each participant one piece of data to take ownership over. While there are many, some examples could be:

- Medium household income of residents from your focus area
- Percent of renters and available/affordable rental units in your focus area
- Percent of clients who have never contacted an animal service agency
- Percent of pets that were unaltered when first met by the outreach team
- Number of spays/neuters provided and your spay/neuter conversion rate

Take five to ten minutes and write a brief paragraph or two on what story this one piece of data tells. Get creative and think about the story from as many angles as possible. For instance, the number of unaltered pets speaks to a lack of access to services, not people's lack of desire to spay/neuter. Share each person's response and spend another ten minutes discussing how each statistic is related and together tells a more complete story.



## *B. How to build support into your budget*

While ongoing fundraising efforts are a necessity to sustain any program, sometimes there are existing resources right in front of us that can be utilized in addition to the development strategies presented in this chapter. The intent of adding a pet owner support program and dedicating resources to underserved communities is that this effort becomes a core, enduring part of your organization's mission. You would never consider other critical aspects of your work like adopter recruitment or in-shelter enrichment efforts to be impermanent or hinging on whether or not you receive a single grant.

As such, it is imperative to factor in your community-based work in your annual planning and budgeting process, so you can honor your commitment to the community you serve well into the future. One way to do this in an informed way that will also appeal to certain funders and stakeholders is to calculate how much it costs to intake, house, and adopt animals versus keeping them in the homes they already have.

PFL is always focused on program efficiency and delivering services in the most effective yet economical way possible. The cost-per-pet for traditional care in animal shelters, rescues, and municipal agencies is often much higher than the proactive work of PFL. Investment in preventative programming is not only less stressful for pets, keeping them in the homes they already have, but also more cost-effective than reactive measures. As long as poverty exists there will always be a need for subsidized services, and PFL has shown that shifting a greater portion of resources to owner support versus re-homing is an appropriate and reasonable path forward for companion animal welfare.



In 2017, a PFL mentorship partner, Salt Lake County Animal Services, conducted an in-depth cost-per-pet assessment. What they found is that, on average, the per-animal shelter cost was \$426 while only \$116 per-animal to keep the pet in the home through their proactive outreach work. While there will be variations in different agency's calculations depending on their process and resources, below are some aspects of your operation to consider when doing your own cost comparison.

IN-SHELTER COST-PER-PET	PFL COST-PER-PET
In-field intake (rescue/ACO staff time)	Outreach staff time
In-field intake (materials, supplies, gas, vehicle maintenance/insurance)	Spay/neuter package (surgery, basic vaccinations, dewormer, flea/tick meds, nail trim)
In-shelter intake (surrender staff time)	Basic wellness care (exams, dewormer, flea/tick meds, treatment of skin issues, antibiotics, pain meds, humane euthanasia, etc.)
In-shelter intake (materials and supplies)	
Medical intake (veterinary staff time)	
Medical intake (exam, s/n, vaccinations, deworming, bloodwork/diagnostics, treatment/medications)	Internal veterinary staff time (if applicable), otherwise vet time may be calculated in cost of services by external partner
Sheltering (kennel and enrichment staff time)	Pet supplies (collars, leashes, crates, tethers, dog houses, litter/litter boxes, etc.)
Sheltering (food, supplies, and ongoing medical)	
Sheltering (utilities, maintenance, and cleaning supplies)	Support services (return-to-owner fees, pet deposits, etc.)
Foster program resources and supplies (including staff foster coordinator time)	Outreach equipment (computer, phone, internet)
Adoption (marketing for recruitment)	Outreach vehicle (gas, maintenance, insurance, graphics/wraps/magnets)
Adoption (adoption counselor staff time)	Program materials (s/n vouchers, program info cards, business cards)
Any ongoing adopter support, such as training	Program marketing/development activities
Shelter marketing/development activities	

## Response

As you read about the cost-effectiveness of proactively providing resources to keep pets in the homes versus caring for animals in the shelter environment, also consider the deep importance of creating equity in access for the many pet owners who have limited, or more often nonexistent, interactions with animal service agencies and the many pets that will never reach the shelter walls. Most calculations used in the field are exclusively shelter-based (intake, euthanasia, adoptions, length of stay, etc.) and, while important, this fails to adequately illustrate need or show impact within the community, outside the shelter walls.

While you reflect on the importance of holistic, sustainable community-based support, ask yourself these questions: How many more individual pets (and people) can we support in a cost-effective way by serving as a consistent, long-term resource for our community? What will it look like for the community, and what will the experience be like for pet owners in underserved communities, in 5, 10, or even 25 years if we can be a regular resource?



## *Initial Implementation Steps*

Collaboratively with internal staff who have the necessary knowledge and financials, particularly for organizations that house animals either in a brick-and-mortar shelter or through a foster-based program, complete an in-depth analysis based on the cost-per-pet from intake to adoption compared to the cost to keep the a pet in the home they already have through proactive and resource-based programming.

If the outcome is that is less costly to keep pets in homes, as is almost always the case, consider how that information can inform strategic program development and guide fundraising conversations with donors interested in community-based programming.





## *In Conclusion*

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The future of companion animal welfare is becoming increasingly contingent upon its ability to serve as a comprehensive community resource and that means recognizing the difference between just offering services and creating equity in access. Delivery of direct care services is part of the solution but if we want true transformational change, attacking systems of inequity is imperative. In animal welfare we have a responsibility and unique opportunity to speak up on and work towards racial and economic justice.

Animals present a strong point of connection and have the potential to bring people together. If we embrace the position animal welfare provides in building trust and relationships, our field can contribute to achieving a more fair and just world for people and pets in a meaningful way.

A paradigm shift is happening, one where animal welfare accepts our movement cannot fully succeed while being disconnected from larger societal concerns and appreciates the contribution that we can make in the realm of social justice.

Evolving our programming and messaging to address systemic poverty and institutional bias is not easy work. There are serious steps to take and a great deal of information to digest as shown in this guide. However, we believe in the compassion and capability of our industry and in everyone who is willing and ready to invest in the process. We encourage you to keep challenging the status quo and we commit that Pets for Life will continue to support and further those efforts.

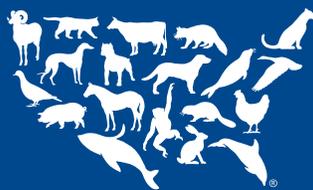






# Pets for Life

[humanesociety.org/petsforlife](https://humanesociety.org/petsforlife)  
[PFLequity.org](https://PFLequity.org)



**THE HUMANE SOCIETY  
OF THE UNITED STATES**