Bridging Case and Cause, Micro and Macro Through Fundraising

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Abstract: A successful career in fundraising reveals it to be an honorable, value-based practice that is consistent with social work's case-to-cause perspective. Although most social work services rely on philanthropy, many social workers hold negative attitudes about fundraising. This narrative demonstrates how fundraising advances social justice while enriching the lives of clients and donors alike. A case example illustrates how fundraising integrates the use of micro and macro social work skills. The author's teaching has changed MSW social work student attitudes about fundraising and encouraged some to pursue fundraising careers.

Keywords: macro, micro, case-to-cause, fundraising

I obtained my MSW in 1975, intending to be a marriage and family counselor. However, a generous scholarship required that I devote two years after graduation to directing the regional office of a national leadership program for high school students. My position was primarily managerial: supervising chapter volunteers, managing budgets, and working with a local board of directors. However, what I enjoyed most was the close engagement with our top teen leaders. They were incredibly smart, creative, talented, and committed. Late afternoon or evening meetings were often followed by long hours just talking in the office or at a diner. Although just seven or eight years older than the graduating seniors, I was a mentor, advisor, counselor, teacher, and safe confidant. I rarely made it home before 10:00 p.m. They made me laugh, sometimes cry, and always challenged me to give my best. Subsequently, several became lifelong friends. And so my two years happily extended to four.

Although I worked out of several locations, the organization operated on a shoestring budget. One of my offices was in an old mortuary with a condemned third floor. Another was in the basement of a synagogue. Revenues just didn't match the quality and potential of the program.

As is all too common with many nonprofit boards, the board members wouldn't meaningfully take on fundraising responsibilities. After trying and failing to change the board culture, I left and moved into the world of federated fundraising, planning, and allocations. There the culture was completely different. Fundraising was at the center of the mission, and my new agency was very good at it. I received formal and informal training and lots of practice. After overcoming my early fear of donor rejection, I became quite skilled.

I recently completed a successful 33-year career in two Jewish federations, mostly as chief executive officer. In that position, I led the development of fundraising strategy and organizational management, raising hundreds of millions of dollars for a wide variety of human services for both the Jewish and larger populations. A major portion of my time was devoted to asking people for money. I cultivated dozens of top donors, conducted innumerable solicitations, and personally raised tens of millions of dollars. What may be surprising is that I can honestly

say that I love fundraising. I still do it on a volunteer basis. With fundraising, I have the satisfaction of seeing the direct impact of my work through the services provided. Moreover, it has afforded me the opportunity to work with and get to know some wonderfully generous people. It's interesting to note that I have not done one hour of marriage or family counseling since graduate school.

However, I am unusual. Ask any social worker or social work manager their biggest problem, and they will likely say funding. The social work profession recognizes the central role of fund development in the management of human services (Birkenmaier & Berg-Weger, 2011; Gronjberg 2008; Watson & Hoefer, 2014). Likewise, fundraising is identified as one of numerous management-focused, macro-practice skills (Netting, 2008), and an important management competency (Hassan & Wimpfheimer, 2016). Yet despite overwhelming reliance on philanthropy, there are few things more repulsive to social workers (and many others) than asking for money (Levy & Aubry, 2008). I'm not speaking about government or foundation grant-writing, I'm talking about person-to-person, individual fundraising. It is perceived as a process of taking from others and as antithetical to, or at least inconsistent with, social work norms and values (Abramson, 1977). Those negative attitudes often lead to avoidance, disparagement of the development staff, and failure to recognize fundraising as a legitimate social work management function that bridges micro and macro skills and case-to-cause impact.

In contrast, I was trained to understand and practice fundraising as a process of community building-actually a form of community organization. In my work, fundraising was seen not only as a means to an end but as a process that builds community in its own right (Abramson 1977; Dunham, 2003; Hurwitz, 1958; Kahn, 1978; Lauffer, 2013; Levy, 1973; Rosenthal, 1975). Organizing a broad, community-wide, annual campaign is about bringing people together to achieve a common purpose. One need only reflect on the sense of community that is created through a fundraising walk, a large fundraising gala, a social media campaign, or a global telethon following a natural disaster. Fundraising is a platform to advance values and outcomes that are central to social work. Fundraising is one of the prime methods we use to educate the public about social needs and what it takes to meet them. Done well, it builds social capital and is one of the major doorways to volunteer activity. These macro level outcomes are supplemented by micro level impacts for the donors themselves. Fundraising empowers people to make a difference in their own and others' lives. It gives them agency. It is about providing a vehicle for people to enact their noblest values, to give back, to honor parents, to observe religious strictures, to model for children, and to establish a legacy. And finally, evidence indicates that altruistic behavior also increases personal well-being (Post, 2005). So rather than taking, I view fundraising as giving to the clients, the community, society at large, and the individual donor as well.

Bridging Case and Cause

Abramovitz and Sherraden (2016) urged the profession to recommit to a case-to-cause framework. Although previously common, this perspective has been largely replaced by a micro focus within social work. The case-to-cause framework calls for social workers and social work agencies to simultaneously meet individual needs while addressing the organizational,

communal, and societal forces, structures, and policies that create or perpetuate those needs.

As a funder, I had the privilege of seeing the incredible impact of our beneficiary agencies on the lives of millions of people. Our funds cared for frail seniors, counseled troubled families, subsidized day care for low-income families, and supported dozens of other social, health, educational, cultural, and recreational programs.

At the same time, the Federation played a social planning role, researching and designing new strategies to meet needs. The organization and several of its funded agencies also addressed systemic issues and public policy. Several beneficiaries worked on fighting intolerance and hate. For example, the community's Holocaust center trained police officers and recruits to understand, recognize, and deal with bias, discrimination, and hate crimes. The organization maintained state and federal legislative offices, which advocated on diverse social service issues such as subsidized housing, nutrition, Medicaid expansion, and child care. During my tenure, a major success was the creation of a federal demonstration project that supported research on and the implementation of naturally occurring retirement communities. This innovative and widely replicated model enables seniors to age in place with dignity, and it enhances health and well-being while dramatically reducing societal costs.

The role that fundraising plays, at both the case and cause levels, should be obvious. Moreover, Abramovitz and Sherraden (2016) underscored the financial resource constraints that hamper ability to act on both the micro and macro levels. These realities pose an ever-growing fundraising challenge for social work professionals and leaders.

For me, case and cause, micro and macro, merged dramatically in the most powerful moment of my career. Throughout the 1980s and 1990s, the Jewish community was intensely focused on obtaining the freedom of two groups of oppressed Jews. On one hand, there was a political and humanitarian effort on behalf of millions of Jews living in the Soviet Union, who were victims of severe discrimination and denied the right to emigrate. On the other, tens of thousands of Ethiopian Jews were trapped in a situation where they endured a ruthless dictatorial regime, civil war, searing droughts, poverty, death, discrimination, and dislocation. Over decades, I participated in marches, including a massive rally in Washington, protests in front of the United Nations and the Russian embassy, and countless educational programs. In addition to both quiet and public advocacy, during those years Jewish Federations across the country mounted several huge fundraising campaigns to support the rescue and resettlement of most Ethiopian Jews and the release and resettlement of over one million Soviet Jews. In later years, I met hundreds of Ethiopian and Russian Jews, helped design programs to facilitate successful resettlement, and continued to advocate until the task was completed.

Under the case-and-cause perspective, we had a responsibility to provide direct relief and other services, but also to engage in policy advocacy and organizational and systemic change to alleviate the conditions that caused the problems and suffering. However, in both cases, alleviating the precipitating conditions was beyond our control. Our only solution was to get them out of the Soviet Union and Ethiopia and then help them rebuild their lives in Israel or Jewish communities around the world. The macro perspective shifted to advocating for Israeli

and United States funding and creating the human services infrastructure that would facilitate resettlement successfully and with dignity.

Through all these years of work, one moment remains indelible in my memory and still causes chills whenever I tell the story. It was Friday afternoon, May 24, 1991. Following years of clandestine, then exposed, and then disrupted rescue efforts and months of bargaining with the Mengistu regime, Israel conducted a miraculous 36-hour airlift that brought 15,000 Ethiopian Jews to freedom and a new life of possibility. The process of emigration and absorption was enormous and continues today. Although not perfect, it is a remarkable chapter in history. In writing about the first and subsequently disrupted phase of rescue, commentator William Safire (1985) said, "For the first time in history, thousands of black people are being brought into a country not in chains but in dignity, not as slaves but as citizens." That Friday, with the Jewish Sabbath approaching, I and peer CEOs around the country received a simple fax message. It informed us that the planes were flying and gave us a simple three-word directive, "Go raise money!"

Bridging Micro & Macro Skills

To many people, fundraisers are sleazy manipulators who use coercive or unethical tactics to shame individuals into giving, much akin to the stereotypical image of a used car salesperson. But the essence of successful individual fundraising is building enduring relationships of trust that create a framework to deeply understand the motivations, needs, and goals of potential donors and match them to organizations and programs that give expression to those aspirations (Tempel, Seiler, & Aldrich, 2011, p. 1). It is about starting where the donor is, listening carefully, exploring options, and gently and ethically overcoming barriers. It is about educating the potential donor on the nature of a problem and the evidence-based interventions that address it. It requires patience, creativity, respectful advocacy, and a commitment to confidentiality because these discussions often touch on deeply personal and family issues. I have found that the macro function of fundraising uses all the micro skills that I learned decades ago. Indeed, I am convinced that because of their knowledge, skills, values, and passion, social workers can be exceptionally good fundraisers. This idea was well-stated by fundraising consultant Paul Jolly (2016), who wrote:

> The Social Work side of fundraising is where all the skill is. Listening between the words, reading between the lines, recognizing patterns in conversation, sensing the moment to ask a provocative question, asking permission to broaden the range of a relationship—these are the Social Work skills that are essential to fundraising success.

An Example

A retired couple was a long-standing, five-figure donor to the organization. Partners in a successful, large family business that had been sold, the couple had substantial financial capacity. However, other charitable causes were more important to them.

Although I knew them, we had our first extended chat at a social occasion. Based on the warmth

of the conversation, I decided to begin working with them directly. I requested an appointment to speak about their annual contribution. They demurred, saying there was no need to meet and assuring me that they would repeat their prior gift. I politely told them that although they felt no need to meet, I did. I said that it was important, and a sign of respect, to brief them on organizational developments and to learn whether they had any concerns or questions about the organization. In addition, I wanted an opportunity to develop a relationship.

They agreed and that began a series of annual meetings at their home. They are delightful people, and our hour-long chats were always interesting, warm, and fun. I briefed them on developments; they asked pointed questions; at times, we debated Jewish issues; and we shared stories about our families and lives. Each year I asked them to consider increasing their gift to meet expanding needs. After several years they did, somewhat. However, they continually emphasized that they were very comfortable at their level of contribution. Although I hadn't been particularly successful, the door remained open.

Believing it unlikely that their annual contribution would increase dramatically, I began to explore their receptivity to an endowed legacy gift. This would be a one-time, very large contribution to perpetuate their support for our community. Each year, I suggested some important project or purpose for the gift, and each year they politely told me that an endowment was possible, but not just yet.

At one point in our relationship, I was able to provide a significant service to them, one that intensified our level of engagement and one they greatly appreciated. This cemented the relationship even more, but they were still not ready to say yes to the endowment. By then, I felt our relationship was strong enough that I could challenge them a bit. I asked why, if they believed an endowment was a good idea, they kept saying no. The wife, who possesses a very sharp wit, looked at me with a bit of a grin and said, "You just haven't wowed us yet!" Her comment immediately clarified my understanding of the situation, and I told her I would not raise the idea again until I had found "wow."

Shortly thereafter, an opportunity arose for a program that addressed a need related to their former business. I made an appointment to present a proposal, and within several days, they committed and wrote a very large six-figure check.

Why was this the "wow"? Like prior proposals, it was for a high priority, high impact program. This was different because it spoke to their life-long, personal and professional identities. Making this gift was natural for them. It was one more way for them to express themselves. We had finally made the connection between the donors' needs and those of the organization, truly a win-win result. Their gift will help maintain the facility used for a critically needed service that helps thousands of people each year.

The story could have ended differently. Maybe they would have granted me one meeting and then resisted further involvement. Maybe I wouldn't have earned their trust. Maybe I would have pushed too hard or given up too early. Maybe I wouldn't have understood them enough to find the right idea. Although I never did therapy with my MSW, that micro training equipped me to

succeed. Perhaps if I had done some counseling along the way, it would not have taken six years.

Since retiring, I have dedicated myself full-time to teaching leadership, management, and organizational behavior to MSW students. I firmly believe that as a profession we must celebrate macro practice, reestablish our claim to the management of human service organizations, and reestablish the relationship between micro and macro practice. We must ensure that our graduates develop relevant macro skills to complement their micro focus. We need to help them understand the relevance of micro skills to macro practice and vice versa.

I also believe that we must help them develop a new mental model of fundraising. My classes always include content on the importance and skill of fundraising. I begin by stating that I love fundraising and asking who else does. As expected, in a class of 25, I might get one or two tentative hands. I then challenge attitudes and the common image of fundraisers. I suggest multiple ways that social workers can support the fundraising function without ever asking for money. I encourage graduating students to consider a fundraising job. There are excellent job opportunities, and fundraising experience will position them well for career growth. Each semester I win several converts, a number of whom have gone on to obtain excellent jobs. More important is that attitudes are being changed. As social workers, who are so dependent on philanthropy, we need to recognize fundraising as a noble, empowering, value-based role in our profession. It advances social justice, helps millions of people, helps create systemic change, and enriches the lives of the donors, often as much as the lives of the recipients.

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