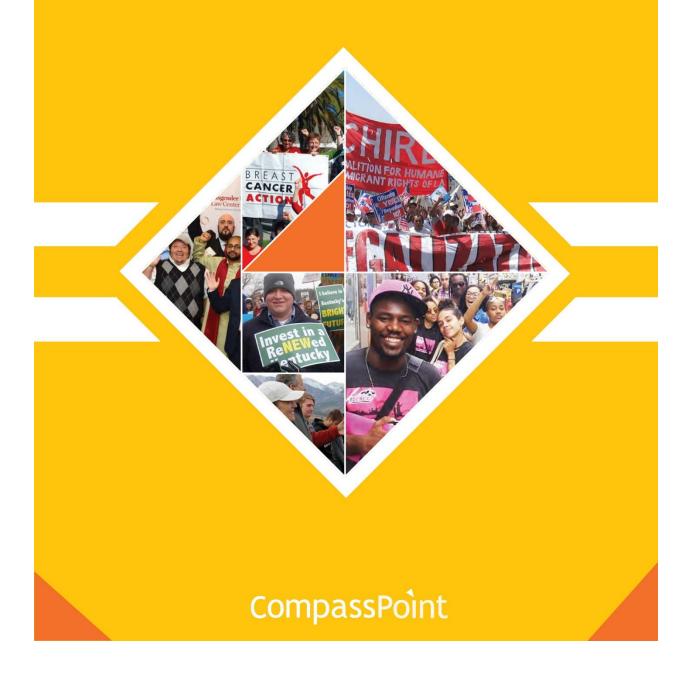# The Fundraising Bright Spots Program
Making Fundraising Work for You

CompassPoint

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ABOUT THE BRIGHT SPOTS TEAM

Berty Arreguin is responsible for ensuring that our workshop trainers and participants can fully engage in a welcoming and transformative learning experience through CompassPoint's Training Program. Prior to joining the CompassPoint Team, she interned in both the San Joaquin Central Valley and the Bay Area at the Central Valley Health Policy Institute and Prospera, which are both committed to helping low-income minority communities. Berty is passionate about helping underserved communities of color, and raising awareness of the health disparities among at-risk groups. A transplant to the Bay Area, Berty enjoys exploring both the East Bay and the San Francisco Bay during her free time, while also making time to visit her hometown of Fresno to visit her family and friends.

Berty has also volunteered as a tutor to Social Science students taking Social Class and Inequality and Sociological Theory courses at California State University, Fresno, and as a facilitator for the Summer Lunch Program at the Central California Regional Obesity Prevention Program. Email her at BertyA@compasspoint.org.

T. Kebo Drew, CFRE is the Managing Director of Queer Women of Color Media Arts Project - QWOCMAP where she is responsible for strategic projects, fundraising, and communications. She joined QWOCMAP as its second staff member in 2007 as a Horizons Foundation Rickey Williams Leader Fellow. In her first year, she expanded QWOCMAP's community partner programs, and soon thereafter developed individual donor campaigns, and instituted sponsorship, in-kind donations, and advertising programs. She also conceived the QWOCMAP Distribution Program's signature presentation, "Reels of Resistance: Film IS Social Justice Activism," which has toured from Montreal to London. A filmmaker, poet, and dancer, she is the writer, producer, and director of *Ain't I A Woman?,* which has screened at the Langston Hughes African American Film Festival, and Seattle Transgender Film Festival, among many others around the world. She is a member of the QWOCMAP Productions Team responsible for story development and she has produced numerous films, that include the award-winning documentary *The Worlds of Bernice Bing* by Madeleine Lim. . She has performed throughout the U.S., Latin America, and Europe as a poet and dancer. She is a Cave Canem Poetry Fellow and won the Audre Lorde/Pat Parker Award and the Astraea Emerging Lesbian Writers Award. She also won the Irene Weed Dance Award and Robert Kuykendall Dance Scholarship. Born in Memphis, she is a multi-lingual 2nd generation activist and 3rd generation queer Black femme whose roots are African, Choctaw, and Irish.

Byron Johnson is a senior project director at CompassPoint where he designs, manages, and provides skills-based coaching and consulting to nonprofit boards, staff, organizations, networks, and government agencies in the areas of board development, executive transitions, strategy, and succession planning. He also teaches fund development and executive transitions workshops in and serves as lead trainer of the Fundraising Academy for Communities of Color, a cohort-based training and coaching series offered in collaboration with the Grassroots Institute for Fundraising Training (GIFT) and Community Partners. Prior to joining CompassPoint in 2005, Byron spent over ten years in leadership and senior fund development positions for local nonprofit organizations, including San Francisco State University, where he was the first planned giving officer, and the East Bay Asian Local Development Corporation. ByronJ@compasspoint.org

Jasmine Hall is CompassPoint's office visionary and is responsible for coordinating issues related to the day-to day operations of the office and supports the human resource and customer service functions of the organization. Her efforts create a work space that is not only supportive to our staff, clients, and guests, but also strives to be an expression of CompassPoint's values. Over the past decade, Jasmine has teamed up with a number of community-based organizations to make change in Oakland. Her last position was project coordinator for The California Endowment's place-based initiative East Oakland Building Healthy Communities. In 2015, Jasmine worked with The Golden State Warriors Foundation and Oakland Parks and Recreation on a community basketball court refurbishment project at Rainbow Recreation Center in East Oakland. She has also partnered with YMCA Eastlake, Moving Forward Education, Oakland and Berkeley Unified School District, and Oakland Public Library. Jasmine studied Sociology at San Diego State University. Upon her return to the Bay Area, she obtained EMT Certification through the Bay Area Youth EMT Program. She also volunteers as an EMT instructor at BAY EMT and continues to dedicate countless hours to under-served communities in Oakland. Email her jasmineh@compasspoint.org.

Nelson Layag's current responsibilities include the design and management of CompassPoint's leadership and management workshops, networks, and conferences; strategy and implementation of organizational communications and marketing; and design and delivery of training focused on people/performance management and project management. He understands and enjoys seeing the power a group of individuals can have when they find a way to work effectively together. He brings this excitement to his work in performance management, project management and developing a training program that meets the needs of people working in the nonprofit sector. Since joining CompassPoint in 1995, Nelson has held numerous posts including Director of Technology and Director of Education. In 1997, Nelson was instrumental in developing the Young Nonprofit Professionals Network (YNPN) in San Francisco and currently sits on the board of Filipino Advocates for Justice NelsonL@compasspoint.org

Steve Lew is a senior project director at CompassPoint. He helps positional and emerging leaders increase their effectiveness in fundraising, governance, leadership, strategy, and multicultural group development. Steve brings over 18 years of training and consulting experience to each of his projects, along with a decade of hands-on experience in managing nonprofits. Steve was CompassPoint's development director and a senior manager for several years, and previously served as executive director and development director in HIV and cultural arts nonprofits in San Francisco. Steve's work at CompassPoint has been deeply connected to building the strength of organizations, leaders, and networks in communities of color. He has co-designed and led the Fundraising Academy for Communities of Color and the Next Generation Leaders of Color Program and has been a fundraising and leadership coach for many of these participants for over a decade. He deeply appreciates nonprofit leaders who are on a path to align their personal values, practices, and impact more closely to the change they are working toward in their organizations. SteveL@compasspoint.org

ABOUT THE PROGRAM

The Fundraising Bright Spots Program: Making Fundraising Work for You

This 8-month-long intensive, will support your organization's **exploration, development, and implementation of a shared leadership approach to fundraising** that aligns to and builds on your organizational values, strengths, and identity.

Research from our latest report, *Fundraising Bright Spots*, shines a light on how organizations that run successful individual donor programs thrive by taking on fundraising in a way that is:

- Core to the **organization's identity**
- **Distributed broadly** across staff, board and volunteers
- Based on **authentic relationships** with donors
- Characterized by **persistence, discipline, and intentionality**

But how can these values play out for your organization when it comes to developing your own fundraising strategy? In this program, we'll help you activate practices from successful grassroots fundraising models and individual donor programs highlighted in the *Fundraising Bright Spots* report. You'll get the **content, expert guidance, and support** you need to spark deep shifts in how you think about fundraising, and ignite a new **plan of action** that can sustain your organization's social justice agenda now and for years to come.

OVERALL PROGRAM OBJECTIVES

Skills/Knowledge:

- Clarify your organizational business model, identifying and creating shared understanding of your "primary and secondary" income strategies
- Achieve greater clarity around which fundraising strategies you are pursuing and why
- Make meaning of donor data to guide your fundraising
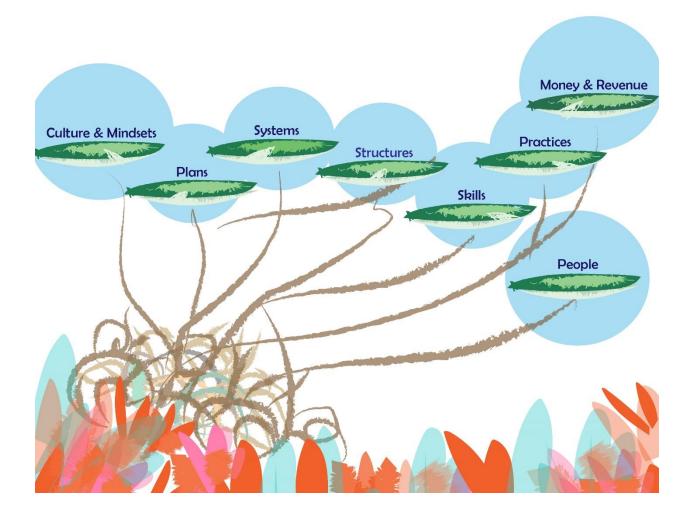
Systems:

- Improve or implement fundraising systems by working to:
    - Clarify data collection strategies
    - Institute practices and habits that will contribute to better understanding of organizational fundraising data

- o Integrate development principles grounded in current field knowledge
- Create a documented plan to distribute fundraising activities throughout the organization
  - o Clarify each person's role

Culture:
- Identify how fundraising lives both inside and outside the organization
- Understand how fundraising can build power in your community, movement, and in the organization
- Be able to name organizational culture shifts required to support your plan

Money & Revenue

Culture & Mindsets

Systems

Structures

Practices

Plans

Skills

People

IN-PERSON SEMINARS

Seminars will be a blend of facilitation and instruction; peer-learning; team work-sessions; and individual reflection. The sessions will be focused on the following themes:

May 4, 2017
SESSION ONE: GETTING GROUNDED & BRIGHT SPOTS PRINCIPLES

May 25, 2017
SESSION TWO: DISTRIBUTED FUNDRAISING: LEADERSHIP ROLES & SKILLS, BUILDING & SHARING POWER

August 10, 2017
SESSION THREE: INTEGRATED SYSTEMS: WEAVING COMMUNICATIONS & DEVELOPMENT

September 7, 2017
SESSION FOUR: CULTURE SHIFTS: THE WHEEL OF CHANGE & AUTHENTIC RELATIONSHIPS

October 5, 2017
SESSION FIVE: WHERE YOUR ORGANIZATION IS HEADED

HOMEWORK

Between each seminar, your team will have homework to continue analysis and development of your plan; guide you in bringing program content and learning back to staff and board; and vet proposed decisions with others within your organization to get feedback, increase ownership, and foster alignment.

COACHING & PROGRAM ADVICE

Your coach is a resource for how you utilize the program and create changes in your work and the organization. One of the biggest missed opportunities is when people leave a session with lots of ideas, yet cannot find the time, support or resources to enact them. Having a thirty to sixty minute call with your coach in between group sessions is a way for your team to stay connected to the Bright Spots program learning and the actions you and your partner hold important.

COMMUNICATION AGREEMENTS

✓ **Confidentiality** is often defined as "what's said in the room stays in the room" and we agree not to discuss what happens here in a way that would identify any individual or organization. There is another dimension to confidentiality that includes "asking permission" to share or discuss any statement another person makes of a personal nature. It helps to remember that the story belongs to the teller, not the listener.

✓ **Move-up Participation**. Honor different beliefs and encourage empowerment by making a space for all voices, experiences and ideas to be heard and shared. Talking does not equal participation. Generous listening is a form of participating. If you speak a lot, try listening more. And it you tend to sit back and listen, consider speaking up more.

✓ **Intent is different than impact**, and both are important. It is also important to own our ability to have a negative impact in another person's life despite our best intention. In generous listening, if we assume positive intent rather than judging or blaming, we can respond, rather than reacting or attacking when a negative impact occurs.

✓ **It's okay to disagree**. Avoid attacking, discounting or judging the beliefs and views of yourself or others – verbally or non-verbally. Instead, welcome disagreements as an opportunity to expand your world. Ask questions to understand other people's perspectives.

LEARNING AGREEMENTS

✓ **Embrace polarities**. Avoid binaries and embrace wicked questions (i.e. paradoxical truths), such as "How can we be both BOLD and humble in our asking?"

✓ **Real play, not role play**. Let's try on ways of being, and ways of doing here in this room.

✓ **Name elephants**. Be intentional about speaking the unspeakable; foster a culture of candor inside and outside your organization.

✓ **Be open to new ideas and perspectives**, and be open to having your current ideas and perspectives challenged.

✓ **Embrace inquiry**. Ask difficult, reflective questions as a matter of course.

SESSION ONE: GETTING GROUNDED & BRIGHT SPOTS PRINCIPLES

Today's objectives:

- ✓ Begin establish a learning community; learning about our individual and collective strengths and talents
- ✓ Create a baseline understanding of how fundraising happens in your organization
- ✓ Understand the fundraising bright spots mindsets in the four theme areas
- ✓ Explore how fundraising is core to your organizational identity
- ✓ Begin to assess alignment of your fundraising activities to your current revenue model

Mapping Your Current Fundraising System

Mapping Exercise

This activity is foundational to the work your team will be doing together over the next six months. Having a clear understanding of the roles you activate for fundraising and development and the people who fulfill those roles is important before planning to make fundraising more widespread. It's as important as your fundraising goals, strategies and, along with a database, the people and roles that comprise the current development system.
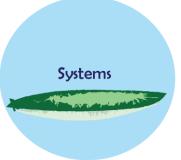
Map it Out

Draw a "map" of your current fundraising structure and environment. Do your best to document what is actually happening (versus what is aspirational or planned). As we move through this program together, your map will change as you analyze your system, adapt new ideas, and try things on.

1. Consider all the activities that occur during the year to raise money from individuals and institutions.

Create a list of those actions, organized around these categories: *Identifying prospective supporters; Cultivation of prospective supporters; Asking for new support and renewals; Recognition and Thanks; Stewardship.* List any events within these categories based on the function that the event is serving.

Example: a house party may be "asking for new support or renewals"   an open house might be "identifying prospective supporters" a gala event may be "Asking" as well as "Stewardship."

Category	List all activities in the year
Identifying potential supporters "prospects"	

Category	List all activities in the year
Cultivation	
Asking	
Recognition	
Stewardship	

On your own… Each person in pair creates their own map.

Once you have named most or all of your activities in a year, map out who is doing what.
1. Start with yourself by putting your name in a circle. Since you are coordinating and leading much of this work, put your circle in the middle.
2. Add additional circles for other people who are also playing more central roles, which require more time and responsibilities in development. Be specific in listing what activities or actions they are expected to do related to the development categories.
3. Create as many circles with people (i.e. the board may actually be many small circles if different members are doing specific and different actions than others. Name each person if you can.
4. Remember to add the donors, volunteers, and clients/constituents who have played special roles in any of the activities you listed.
5. Now look at your map. Notice who is named. Now ask yourself if each person actually made an effort in the activity or if they are there in name only ☹. Cross out those activities that did not happen.
6. Place a positive symbol or a star by the people who are getting most of their activities done. Consider them your "bright spots" in fundraising. Ask: *What did you learn from any of these people in the last month about how and why they were able to do what they did in fundraising?*

Now map it out further…
1. What supports these bright spots? What 'system tools' are used to fulfill the fundraising functions? Name things like your database, email server, social media platforms, gift recordkeeping, and other processes with a box around each tool. Connect names of the people who maintain the tools by drawing a line to their circle.
2. What Allies and Opinion Makers have helped with your fundraising? (Think advisory council members, elected officials and public agency employees, activists from coalitions who have helped out, etc.)
3. What else would you include that we haven't thought of?

Paired work:

Share your maps with each other-
- *What did each of us emphasize differently?*
- *Who are the people if any that we see as bright spots?*
- *What areas are we really covering, and what areas are we really missing?*
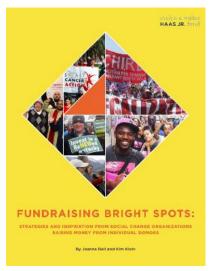- *What else do your maps tell you?*

You will come back to this again to envision a future fundraising map- for now take a photo of each of your maps and send them to each other and send a copy to Berty BertyA@compasspoint.org for future reference.

Fundraising Bright Spots: Key Themes

Fundraising is Core to the Organization's Identity

"We don't set goals for [our clients], they set their own goals and we accept and respect them unconditionally. Same with the board and donors. 'What do you want to do? Great, how can we help you?'"

Fundraising is Distributed Broadly Across Staff, Board and Volunteers

"It's not about someone being professional or educated in a certain way. It's really about shedding light on the fact that we already have these skills in communities of color. It's about making visible and lifting up the resourcefulness that we've always had."

Fundraising Succeeds Because of Authentic Relationships with Donors

"I love our donors. I actually love them, I have a personal intimate connection to them when I sit down and write a fundraising letter. I adore them. I think they are extraordinary people."

Fundraising is Characterized by Persistence, Discipline, and Intentionality

"We don't have a singular development plan. We have a system."

Brightness Self-Assessment

Are these mindsets prevalent in your organization?

First do an individual assessment, then compare with your teammate.

Fundraising is Core to the Organization's Identity				
Mindsets	**Strongly Disagree**	**Disagree**	**Agree**	**Strongly Agree**
1. The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational values.	1	2	3	4
2. Being genuine about who we are and what we stand for as an organization is core to fundraising success	1	2	3	4
3. Fundraising is a form of organizing and power-building, not merely a strategy for financing the organization's work.	1	2	3	4

Fundraising is Distributed Broadly Across Staff, Board and Volunteers				
Mindsets	**Strongly Disagree**	**Disagree**	**Agree**	**Strongly Agree**
4. Fundraising is not the purview of a select group of professionals, but a process, if well-supported, that anyone can engage in.	1	2	3	4
5. Development directors are organizational leaders focused on skill building, culture change, and systems development to support others in fundraising.	1	2	3	4
6. The conversation about fundraising goals and progress belongs everywhere. It's not contained in a single department or confined to a single team.	1	2	3	4

Fundraising Succeeds Because of Authentic Relationships with Donors				
Mindsets	**Strongly Disagree**	**Disagree**	**Agree**	**Strongly Agree**
7. "Donor" is only one aspect of the many relationships that committed supporters forge with our organization.	1	2	3	4
8. Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.	1	2	3	4
9. High trust and accountability among staff and board members allow leaders to weather fundraising's inevitable ups and downs together.	1	2	3	4

Fundraising is Characterized by Persistence, Discipline, and Intentionality				
Mindsets	**Strongly Disagree**	**Disagree**	**Agree**	**Strongly Agree**
10. More important than having a perfect system is working whatever system we have with a stance of rigor and continuous improvement.	1	2	3	4
11. Development and communications are inextricably linked; compelling communications are a powerful way to acquire, engage, and retain donors.	1	2	3	4
12. The use of data is not just about having a donor database. It's also about surveying our donors; getting feedback from our fundraisers on what messages are resonating; and studying the performance of every fundraising campaign and event.	1	2	3	4

Assessment Notes:

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Organizational Identity: What is Core?

"**Who are we now**?" is a query that keeps us noticing how we are creating ourselves—not through words and position papers, but through our actions and reactions from moment to moment. All living systems spin themselves into existence because of what they choose to notice and how they choose to respond. This is also true of human organizations, so we need to acknowledge that we are constantly creating the organization through our responses.

To monitor our own evolution, we need to ask this question regularly. Without such monitoring, we may be shocked to realize who we've become while we weren't watching."

From "Bringing Life to Organizational Change" by Margaret J. Wheatley & Myron Kellner-Rogers (emphasis added)

What is Core?

A dictionary definition of core names it as the "central, innermost, or most essential part of anything." In his work, researcher and management consultant Jim Collins discusses an organization's core ideology in the terms of deepening our understanding of it, not designing or creating it:

> *"You do not create or set core ideology. You discover core ideology. You do not deduce it by looking at the external environment. You understand it by looking inside. Ideology has to be authentic. You cannot fake it. Discovering core ideology is not an intellectual exercise. Do not ask, "What core values should we hold?" Ask instead, "What core values do we truly and passionately hold?" You should not confuse values that you think the organization ought to have – but does not – with authentic core values. To do so would create cynicism throughout the organization.[1]*

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[1] "Building Your Company's Vision," Collins & Porras, Harvard Business Review, 1996.

Bright Spot Examples of Core Identity

Traditionally, fundraising has been viewed as a supporting activity, an overhead cost, or as a means to a programmatic end. That's not the case for the Bright Spots. For them, fundraising is part and parcel of organizational identity. Who they are and what they believe specifically informs how they approach fundraising from individuals. Many of the Bright Spots identify as social justice movement-building organizations. For them, giving money is integral to being part of a movement. They involve their donors and members in fundraising as part of a broad array of engagement strategies such as strategic agenda setting, issue education, and political action.

Bright Spots organizations could easily articulate how fundraising from individuals is inspired by and reflective of their organizational values. Their work reminds us that fundraising identity can't be tacked on, hired, or manufactured to meet a budget shortfall; it is embedded in organizational identity

Unconditional acceptance, self-determination, and individualization

Member engagement is leadership development

Our work is building power and building the base

Think Before You Pink

EXERCISE in Pairs

1. Think of a time when your groups' fundraising AND message AND program fit together 'just right'. Describe the details to each other.

   What were you doing, what were others doing well. What did that strength look like, feel like?

2. What words do you use to describe what is "core" in your organization's identity.

   Consider:

   - ✓ **What is your organization's unique approach(es) to the work?**
   - ✓ **Organizational values and principles?**
   - ✓ **Positive attributes of organizational culture?**

3. In teams, write one to three brief phrases that describe your core organizational identity.

   Guiding principles, values, and tenets that undergird everything that your organization does and that fundraising should generate from.

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Articulating Your Revenue Model

A nonprofit revenue model is a framework for generating revenues that allows the organization to maximize its intended impact while also generating small surpluses that will feed the organization's future efforts. Often, articulating the revenue model provides the leaders of the organization with focus and clarity as they pursue an optimal business model that allows the organization to thrive in achieving its intended impact.

As nonprofits, we have access to several different streams of funding, and while each of those streams offer us different benefits, each also requires us to develop different management structures and relationships. In years past, "revenue diversity" has often been lauded as a critical element of nonprofit financial management and fiscal health. However, as the sector matures, we are understanding more deeply the programmatic and infrastructure implications of different revenue strategies. Research by *The Bridgespan Group*, among others, has demonstrated that many organizations successfully grow through intentional investment in a dominant type of revenue that is aligned with its work and intended impact (and focus efforts on diversifying among several sources). It's good to have one primary income type that is reliable and repeatable and a secondary unrestricted income source. Even having 8% of your income from annual giving can ease cash flow throughout the year—8% is one month of operating expense!

EXAMPLES: REVENUE STREAMS

- Foundation grants restricted
- Foundation grants unrestricted
- Corporate donations/sponsorships
- Tuition income
- Earned income, fees
- Membership income
- Individual contributions (unrestricted)
- Special event income

Sources are within a stream, for example:

Stream → Restricted foundation grants.
Sources within that stream→ The California Endowment, Irvine Foundation, Ford Foundation

RIGHT REVENUE

The state of your revenue working in concert with your intended impact and values. Rather than focusing solely on the question of income diversification, the fundamental question is this:

Do you have the right revenue to pursue your intended impact in a financially viable manner that is aligned with your organizational values*?*

1. Does the current revenue mix reliably produce a modest surplus?
2. Do we have a reliable source of unrestricted support?
3. Are our largest sources of income paying for work that we deem essential to our intended impact?
4. Are we relying on a funding stream that is changing substantially, and is that change beyond our control?
5. Are we relying on a funding stream that is misaligned with our organizational values?

RIGHT RELATIONSHIP

Just as important as the source of income are the people behind that source. As we articulate your funding model, it is equally important to assess the degree to which you are in right relationship with those that support your organization. The question is:

Are the people supporting your organization aligned with your organizational values, identity, and goals?

EXERCISE

> "Donors do *not* give to your organization. They give *through* your organization to achieve their own desires…to fulfill their own aspirations…to live out their own values."—Simone Joyaux

1. <u>Who decides</u>? Within your principal source of funding, who are the particular set of people who dictate the flow of funds? What does that mean for the relationships and systems you need to attend to?
2. <u>What are their motivations</u>? Thinking of these people specifically, what do they want to achieve – for themselves and/or their communities – by giving to your organization? How do they think about and assess the value that your organization delivers?
3. <u>What are the power dynamics in the relationships</u>? Thinking of these people specifically, what power dynamics are at play between you and them? Do they responsibly use their power or do they wield their power inappropriately and/or oppressively?

HOMEWORK

Before Session 2, each team should complete the following homework:

- Debrief this session with your partner, clarify any role, surface any agreements for how you can participate, and bring back ideas and new actions.
- Re-visit your revenue worksheet and determine what action or decision making is needed, if anything.
- Refine your *What Is Core* statement.
- Schedule your first session with your coach.

How are you leaving today?

What will you share with others in your organization?