The Fundraising Bright Spots Program
Making Fundraising Work for You

CompassPoint

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 is it that we are an organization with a national identity and we are uniquely adapted to each local setting?"

- ✓ **Real play, not role play**. This space is an opportunity to practice meaningful conversations that will occur in your organizations.

- ✓ **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.

- ✓ **Be ready for pivots**, from ambiguity to direction, from abstract to concrete, from options to decisions.

- ✓ **Don't come to consensus too soon**. It's okay to let things simmer and it's okay to change our minds. Create a parking lot for unresolved issues that we need to reflect on and revisit later.

SESSION TWO:

DISTRIBUTED FUNDRAISING: LEADERSHIP ROLES AND SKILLS

Today's objectives:

- ✓ Have named potential shifts in your personal beliefs about fundraising, money, power and leadership.

- ✓ Have begun to identify ways to apply "fundraising bright spots" concepts to your fundraising staffing structure.

- ✓ Have a deeper understanding of the competencies needed throughout your organization to strengthen fundraising.

- ✓ Have begun to name the systems you use, and how they might support further distribution of fundraising.
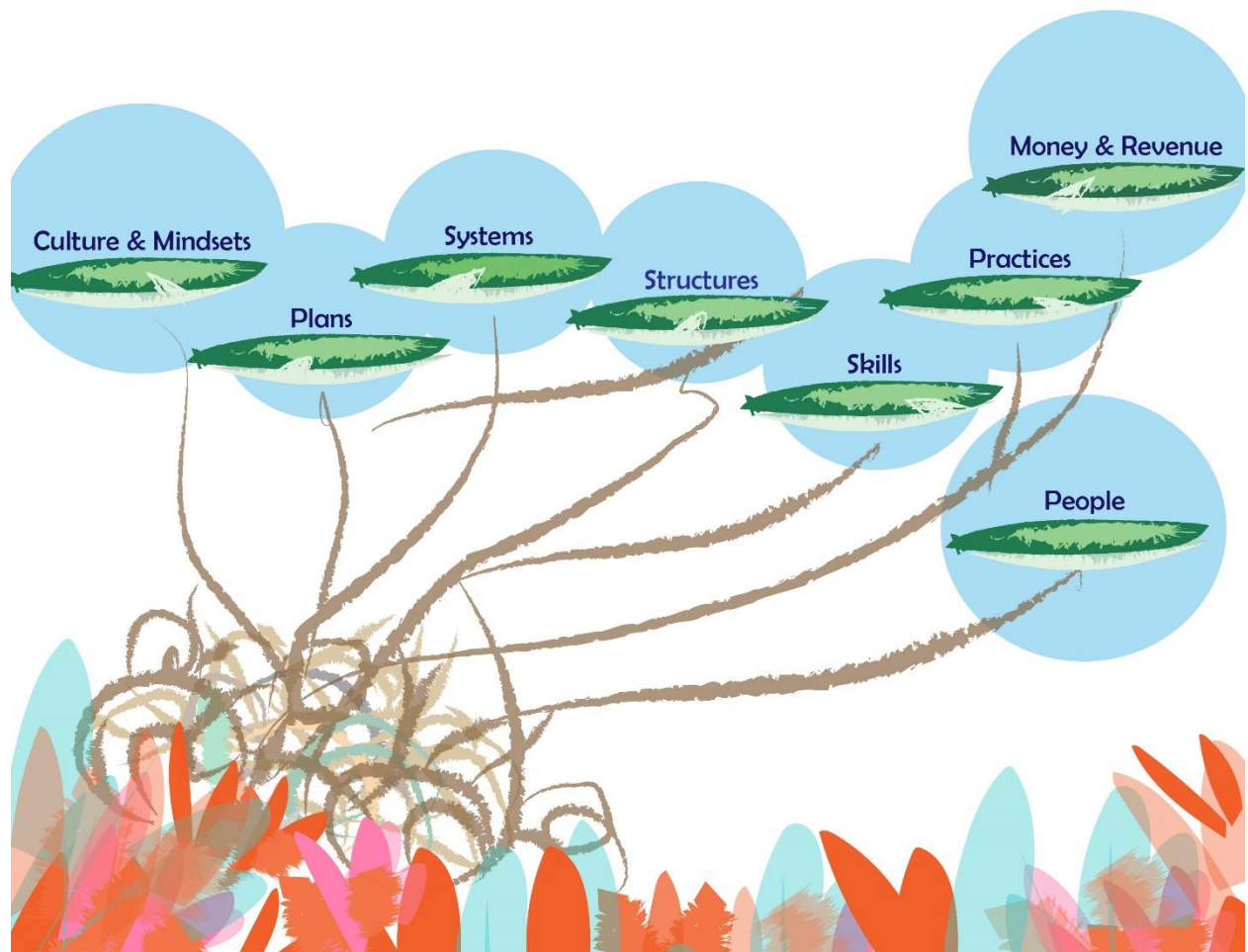
Mapping Our Experiences

A Training Exercise

GIFT and FIERCE

IT'S EASY TO TEACH PEOPLE HOW TO RAISE MONEY. It's harder to get them to actually do it. What often holds us back from being effective fundraisers is not lack of skill but negative experiences with money or fundraising.

Here are some of the typical negative experiences that many of us have had:

- Unhealthy communication—as when there is fighting within families over money
- Unjust power dynamics—as happens when people feel coerced by those who have money that they need
- Diminished self-worth from the feeling of not having enough money
- Guilt over having more money than others
- A sense of scarcity from believing that one will never have enough money

When we don't dedicate time to exploring these experiences during our fundraising planning processes, usually one of two things occurs: People go along with the creation of the fundraising plan but because they haven't raised or perhaps even recognized their negative feelings, they don't implement it. Or, people raise these issues but in a way that is unproductive, such as perpetuating myths, resisting participation, or creating tension or hostility.

To help bring these experiences into your fundraising discussions in a productive way, use this fun and revealing exercise at the beginning of a training, meeting, or retreat. It combines writing, talking, moving, and sharing in small groups as well as in the big group so that participants can dig deeper and think more creatively about how they can feel supported to raise money.

We have found that doing this exercise helps ground people in what they already know and helps them link their past experiences with their current fundraising efforts.

Questions to Get You Started

THE TYPES OF QUESTIONS THAT WORK BEST are those that are open-ended (rather than answered with a simple yes or no) but can be answered in a few words or one sentence. For example, rather than asking "Do you like fundraising?" (answers will be too shallow) or "Share one positive fundraising experience" (answers will be too long), try, "What is one thing you like about fundraising?" It's a good idea to mix a couple of fun and easy ones with those that are more serious and provocative. Here are some of our favorites:

What sustains you in fundraising?

Where do you turn for fundraising inspiration?

What do you like most about raising money?

What's the largest amount of money you've asked for and received?

What comes to mind when you think of the word "money"?

What comes to mind when you think of the term "fundraising"?

What's the most challenging thing you've experienced while fundraising?

How has race (or gender identity, sexual orientation, age, disability, class) affected your fundraising efforts?

What's the worst response you ever got when asking someone for money?

What is one value you hold around the way you raise money?

What is a skill, talent, or resource you have that helps you in raising money?

What is one feeling you often experience in fundraising from institutions such as foundations, corporations, or government agencies?

What is one feeling you often experience in grassroots fundraising—asking for money from individuals within your community?

Exercise: Mapping Our Experiences

Goal: To help deepen our conversations around fundraising and increase our effectiveness in doing fundraising by recognizing the fuller breadth of our experiences.

Participants: Anyone who will be fundraising for the organization. This exercise is easiest facilitated for 8-20 participants.

Time needed: 30-60 minutes

Materials: Flip chart paper, enough markers for everyone there, tape.

Preparation: Decide who will facilitate the exercise. Choose four to seven questions from the list in the sidebar that are relevant to your group, or create your own questions. Write one question at the top of each flip chart sheet. Tape the sheets up around the room, leaving a few feet of space in between sheets.

Steps:

1. Everyone picks up a marker. Without talking, each participant walks around the room, writing answers to each of the questions on the posted sheets. The facilitator encourages participants to answer with their first reactions rather than think too long about what to write. People should spend no more than two minutes on each question. Provide two-minute and one-minute warnings.

2. Divide participants into as many groups as there are flip chart sheets or fewer (ideally, three to five people per group). Have each group stand in front of one of the flip charts and briefly discuss the answers there. After a few minutes, each group moves on to the next sheet, and so on. The total amount of time for this section should only be two to five minutes per question. Be sure to give time notifications to keep groups moving, as this section can take quite long otherwise. Don't worry if

there isn't enough time for every group to discuss all the questions. An alternative, if you are short on time, is to give the entire group five or ten minutes to walk around the room looking at all the charts individually without discussing their responses.

3. Bring the large group back together and ask these reflection questions:
   - Did you find any of the questions to be particularly challenging to answer?
   - Did you find any of the responses to be surprising?
   - Did you notice any similarities, differences, or themes among the responses?

Follow-up. Use this information to help inform your fundraising planning and training. For example, if several people shared during the exercise that talking about money triggers anxiety, you may want to spend time exploring the fear of asking (see the excellent *Grassroots Fundraising Journal* article, "Getting Over the Fear of Asking," by Kim Klein available at grassrootsfundraising.org).

You can then incorporate support mechanisms in your fundraising campaigns to address the anxiety, such as beginning fundraising discussions with breathing or relaxation exercises, pairing people up with fundraising buddies, or having each person post an inspiring quote on their wall when making fundraising calls. ■

FIERCE is a membership-based organization building the leadership and power of lesbian, gay, bisexual, transgender, and queer (LGBTQ) youth of color in New York City. GIFT and FIERCE co-facilitated this exercise at the Brecht Forum's 2011 annual grassroots fundraising conference.

SAF board and staff receiving $100,000 grant from the Blue Cross Blue Shield of NC Foundation in celebration of its 10th anniversary. Photo Credit: BCBSNC Foundation

"Soy Safista"

Turning Community Ownership into Community Dollars

By Heather Yandow & Meredith Emmett

STUDENT ACTION WITH FARMWORKERS (SAF) has a saying: Soy Safista. Everyone is SAF, and everyone can tell the story of SAF. That ethos is at the core of the organization's successful volunteer fundraising campaign where SAF alumni and Board members share their SAF stories and ask friends and family to support the organization.

SAF developed this campaign after taking a closer look at their fundraising strategies. The organization was in a situation in which many nonprofits find themselves—their fundraising program was doing okay, but not flourishing. The organization had dozens of different fundraising activities spreading themselves thin in their efforts to raise money. SAF needed to streamline their strategies and grow their revenue. So they turned to us at Third Space Studio. Third Space Studio partners with nonprofits around the country to help them become more focused and strategic.

We worked with SAF board and staff to determine the organization's strengths, analyze their current fundraising strategies, and identify which strategies should be abandoned. After letting

go of labor-intensive events and a few other low-performing strategies, the organization began to think about new strategies that would build on their strengths and efficiently raise money for their work.

Over their 20-year history, SAF has chosen to focus on individual donor contributions to ensure they have ample unrestricted funds to work with undocumented students, engage in advocacy, and organize students to improve conditions for farmworkers. As Melinda Wiggins, Executive Director of SAF says, "We don't want to be limited as to what we do, who we do it with, and how we do it."

Given SAF's focus on individual donors, a large base of alumni, and its "Soy Safista" mantra, a volunteer-driven campaign was a natural fit. Through the campaign, SAF wanted to build relationships with donors who care about the work of the organization as well as work toward its mission by developing the leadership skills of young people and Latinos, two key groups of volunteer fundraisers.

This campaign has been successful for some of the same

reasons SAF began the campaign: a large base of alumni willing to volunteer to fundraise, and the ability of everyone involved to tell good stories about the organization. The campaign also succeeded because of SAF's strong fundraising culture, in which fundraising is an integral part of programmatic work. All program participants—interns, fellows, youth, and student organizers—fundraise as part of their leadership training. SAF also has an evolution mindset, meaning that each year SAF evaluates and changes the campaign, tweaking big and little things about how it worked. As a result, SAF has continually raised more money and found more donors.

The Campaign

SAF's campaign is a short, volunteer-based online fundraising campaign that happens once a year.

- **Short:** The campaign period, including training and online fundraising is only two months. Volunteer fundraisers pick a two-day to one-week period to complete their campaign.
- **Volunteer-based:** 15 to 20 SAF alumni and board members participate, and staff support their work.
- **Online:** SAF uses an online platform that accepts donations and tracks fundraising progress (see more about technology options below).

After several campaigns, SAF has developed a timeline for preparing and carrying out its online fundraising campaign:

- **Two months before the campaign,** SAF focuses on recruiting volunteer fundraisers through both broad appeals and targeted conversations. They also review and update existing materials and create any new materials they will need to train their volunteers, carry out the campaign, and thank donors.
- **One month before the campaign,** SAF confirms their volunteer fundraisers, sets up a date for a group training, and shares materials about the campaign with fundraisers.
- **Two weeks before the campaign,** SAF hosts an in-person training (with online options for those far away) for volunteers that covers the basics of the technology and fundraising skills needed for the campaign. Volunteers are encouraged to set up their online fundraising websites during this training. SAF staff also follow up with those unable to attend the training to provide personalized support.
- **During the campaign,** SAF spends a significant amount of time coordinating the campaign. This includes sending weekly updates to volunteer fundraisers with donation totals, tips, and success stories. Staff also personally contact each volunteer fundraiser before their individual fundraising period begins. In addition, they work to fix technology glitches and process all donations coming into the organization. This can be a huge task; SAF had as many as 100 gifts come in during a four-day period at the end of 2011.
- **After the campaign,** SAF sends out the final campaign results and asks for feedback on successful strategies and suggested improvements.

The goal of this campaign is not only to increase individual donor funding for the organization, but also to increase the number of people who know about and support the organization. By asking volunteer fundraisers to reach out to their communities, SAF is broadening its reach and increasing the number of people who know about its work and join its mailing list.

The Technology

SAF uses an online database and fundraising tool called NEON by Z2 Systems. Although there were some bumps in getting the database up and running, SAF staff have found this fundraising tool indispensible in their work. In particular, NEON has a feature where volunteers can create personalized fundraising pages that include their stories and fundraising goals. The donations made on these pages are logged directly into SAF's database, making donor tracking extremely simple.

Volunteer fundraisers found the system relatively easy to use once SAF staff trained them. In particular, the ability to create professional looking pages and track their fundraising progress online enabled volunteers to run successful campaigns.

Several other comparable online systems exist that allow organizations to do what is often called peer-to-peer or social fundraising. These tools include:

- CauseVox: causevox.com
- Chip In: chipin.com
- Razoo: razoo.com
- FirstGiving: firstgiving.com

For more information, tips, and suggestions, check out Idealware's article on tools for "friend-to-friend" fundraising: idealware.org/FGTOnlineDistributedFundraising.php.

The Success

SAF has now completed its online fundraising campaign three times, raising more money and finding more new donors each year. In its 2011 campaign, SAF raised $23,965 through online volunteer fundraising, a 75 percent increase over the

course of three campaigns.

What has caused this growth? While the number of volunteer fundraisers and average gift amount has stayed steady, the volunteer fundraisers have become more effective. The average volunteer fundraiser raised $1,331 in the 2011 campaign, up 64 percent from the first year. The number of donors secured by each volunteer fundraiser has also grown significantly. In 2011, each volunteer collected gifts from an average of 21 donors, up from 15 in the first year.

"I'm amazed at what our volunteers have been able to accomplish," says Melinda Wiggins. "Three years ago, an online volunteer-driven fundraising campaign was just an idea. Now, we've got a sustainable annual fundraising campaign that brings in significant revenue and supports our mission."

SAF made a conscious decision to find more effective fundraisers. In particular, they look for people who:

- are close to the organization—mostly alumni and board members;
- have strong connections in their own communities;
- are active online, mainly on Facebook; and
- are comfortable with online technology such as email and donating online.

These four factors make for an ideal online fundraiser who can tell compelling stories about the organization and get those stories out to their community, through online social networks and otherwise. SAF also looked to create a pool of fundraisers with geographic diversity to minimize competition for donors.

Tips for Volunteer Fundraisers

As mentioned above, the online campaign has grown over the years due to volunteer fundraisers becoming more and more effective. If this is a strategy your organization wants to try, here are some tips for your volunteers:

- **Set a stretch goal for yourself.** Set a realistic, yet aspirational goal for your campaign. This goal will help focus your efforts and motivate potential donors. Be sure to mention your goal—and how much you have left to raise—in your online and personal appeals for support.
- **Make your own significant gift.** It's hard to ask other people for gifts if you have not given. Be the first person to make a gift to your campaign.
- **Create your story.** Donors will be motivated by the story of why you care about the organization's work. Wiggins says this story can often be found through three questions: 1) What is your first memory of the organization? 2) What is your connection with the mission? 3) What difference has the work of the

organization made in your life? SAF alumnae Michelle Lozano Villegas stated, "I was really nervous about fundraising at the beginning, but I got really excited remembering the work I did with SAF. I know that donors aren't giving money just for me, but because SAF deserves it!"

- **Get creative about your pool of potential donors.** Think about all of the social connections you have: friends, family, co-workers (current and former), teachers (current and former), mentors, members of your faith community, neighbors, gym buddies, etc. "You never know who is going to give," said SAF Board member Andrea Kells. "I got a donation from a friend I hadn't seen since high school and from someone I'd only met once through Facebook."
- **Do the math on your asks.** Once you have determined your fundraising goal and list of potential donors (or at least groups of donors), you can start to identify the number and size of gifts you need. To raise $500, you could find five gifts of $100 or 100 gifts of $5—whichever is right for you. One great tool for this is the donor pyramid—a simple table of how many gifts you need at each gift level.
- **Communicate regularly with your potential donors.** The most successful volunteer fundraisers posted on Facebook at least once a day and sent at least one email a day to all their potential donors, including those that had already given during the campaign. These emails included updates on progress toward the campaign goal as well as stories about the organization's work. Because you are keeping the campaign short (under a week), the emails and Facebook posts are unlikely to become overwhelming for your potential donors.
- **Make a personal ask to your potential donors.** The old fundraising adage is still true: people give to people, even online. Email, call, or meet in-person with donors to make a personal ask. Be sure this ask includes the amount your are requesting (as determined by your planning) and a story that is relevant to what you know about the potential donor. You may choose to focus on different aspects of the organization or your work with them depending on the potential donor's interests or your connection with them. For example, one alumnae of SAF focused on how her internship taught her to be a better nonprofit staffer when she asked former co-workers for donations. "My personal connection to SAF was what motivated my donors. They really wanted to support

something I was working on," says Lyndsey Beutin.

- **Unrelated rewards generally are not worth it.** Several volunteer fundraisers used rewards unrelated to SAF's mission, such as a silly prize for the biggest donation or an embarrassing task for the volunteer fundraiser if they reached their goal. These activities usually took a lot of work and didn't make a big difference in the volunteer's success. However, rewards that are directly related to the work of the organization can have a significant impact. Board member Irene Godinez talked a lot about food—and the farmworkers that helped to grow it—during her fundraising campaign. The granddaughter of farmers in Mexico, Godinez's reward was rooted in her personal connection to SAF's work and was directly related to food. "My best strategy for recruiting donors was to offer a homemade Mexican meal at my mother's house for the biggest donor," says Godinez. "Within a couple of hours, I had lots of new donors. The winner and his family came to a huge gathering at my mother's house and it was wonderful to be able to tell everyone why they were there. My mother loved it and wants to do something else for SAF now. She had never been a donor before."

Lessons Learned

- **Online fundraising requires a unique set of skills and trainings to develop those skills.** At first, SAF's volunteer fundraising campaign included both online and offline activities, but they realized after the first year that the two needed different kinds of support. Now, the campaign is solely focused on online fundraising. The training for volunteer fundraisers includes not only how

to use the technology, but more basic training on how to make the ask for support and build relationships with potential donors.

- **Keep the timeline of the campaign short.** In the first year, volunteer fundraisers had campaigns that lasted as long as two months. SAF learned that it was hard to build and sustain excitement over that period—and donations suffered because of it. They also learned that most people gave at the beginning and end of the campaign, no matter how many days the campaign lasted. Now, volunteer fundraisers are encouraged to keep their campaigns to a week or less.
- **Work one-on-one with volunteer fundraisers.** SAF provides training and support for volunteer fundraisers as a large group and then reaches out to volunteers individually to check on their progress and help troubleshoot. It is this one-on-one support that has paid off over the years.
- **Include staff as fundraisers.** Staff can model best practices for volunteer fundraisers, reach out to lapsed organizational donors, or strengthen relationships with current donors. SAF's executive director participates in each campaign, reaching out to her contacts and to the organization's donors. "It's a great way for me to engage our current donors to give more or move to online giving," says Wiggins. "And I get to work alongside board members and alumni and build my connection with them at the same time."
- **Track and share what works.** SAF collects feedback from volunteer fundraisers after each year's campaign. The best fundraising strategies, as well as tips from past volunteer fundraisers, are shared with each new crop of volunteers.

READ MORE ABOUT ONLINE FUNDRAISING CAMPAIGNS
Visit grassrootsfundraising.org/archive for these articles:

Building Online Community: A Key to Fundraising on the Internet by Mary Ann McGivern

Meeting Your Match: Using Matching Gifts to Supercharge Your Online Fundraising Campaign by Nzinga Koné-Miller

Raising Funds—and People Power—Online by Brian Dever and Erin Barnes

Raising Money With E-Mail by Madeline Stanionis

Student Action with Farmworkers is a 501(c)3 non-profit organization whose mission is to bring students and farmworkers together to learn about each other's lives, share resources and skills, improve conditions for farmworkers, and build diverse coalitions working for social change. saf-unite.org

Third Space Studio works with nonprofits big and small to help them become more focused and strategic. Through strategic planning, business model development, facilitation, and coaching, Meredith Emmett and Heather Yandow help nonprofits work smarter and be more successful. thirdspacestudio.com
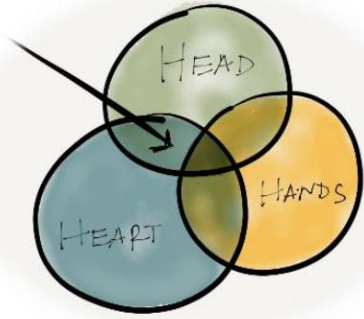
What Are You Curious About?
What's Different Now?

In small groups, discuss:

• What new actions have happened since session 1?
• What are you curious about from the Bright Spots Interview, Revenue Worksheet or Core Identity Statement?
• What's a question you want to think about today related to your structure, systems or culture?

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Exercise on Money and Power

First round: Home Culture.   What did you learn in your home about money? When did your family talk about money, how did they talk about it? How was money shared, given away in the community you grew up in? You can share both positive and negative memories about money and power in your home culture.

Second round: Dominant Culture.   What does the mainstream/dominant culture teach us about the relationship of money & power? What did you learn in school or from news, entertainment media? How does that influence your thinking and behavior with regard to money?

Third round: Money Culture. Who is perceived to be good with money? Who is trusted to handle money, and the power that comes with it? How does culture impact philanthropy for your organization? How do your bright spots illuminate or obscure perceptions about money and power? What strategies can you use to expand your bright spots?

How can we disrupt certain behaviors and beliefs in fundraising?

Notes for personal reflection: Changing Power Dynamics.   Think of your work as a fundraiser. What we think and feel about asking for money can change over time.   What have you learned or tried in changing power dynamics so that you and others are more powerful when asking for money?

Group Debrief – Group Mind Sets

Name any group mind sets that hold back power building and fundraising in your organization?

How can we disrupt, challenge them?

Fundraising is Distributed Broadly across Staff, Board and Volunteers

From Bright Spot Interviews

> We engage staff in two fundraising vehicles a year: our gala and our membership drive. They know these are coming and when they're going to end; they know they're going to have to set a goal. We provide talking points, tracking sheets, trainings, one-on-ones, all kinds of materials that people need to engage. We do regular check-ins about the outcomes; it's very transparent. It's not about public shaming but collective accountability.

> 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.

> My primary job as Development Director is leadership development. Leadership development is the first among equals of all of [our] strategies. Without leadership development of staff, board, and members, none of our other strategies are possible.

From the Research

The *UnderDeveloped* report revealed many organizations think that the answer to their fundraising challenges lies in finding that elusive, perfect development director. Surprisingly, we found that the majority of the people we interviewed from each Bright Spot organization—all of them involved in fundraising in one way or another—did not have development in their title. Some organizations intentionally did not have the word development in their titles. In fact, some organizations intentionally do not have a development director. Instead, fundraising roles and responsibilities are distributed among staff, board, and volunteers, who often use online crowdfunding platforms to allow the fundraisers to tailor the message of the campaign to resonate among their own peer networks.
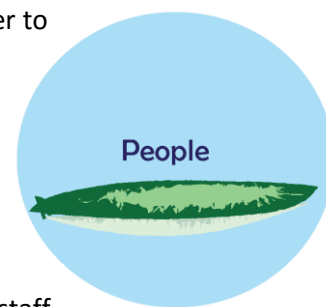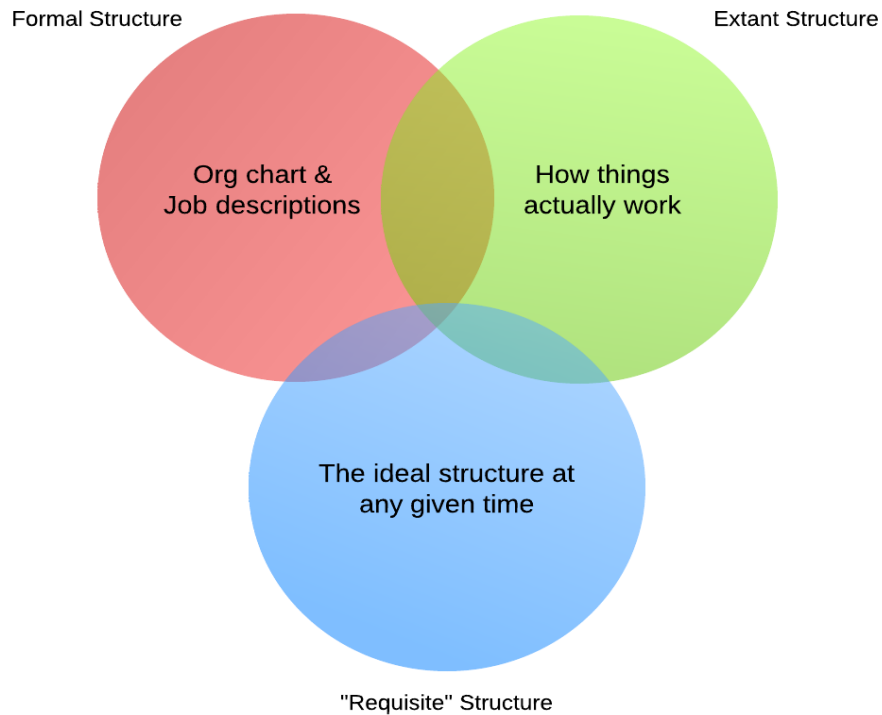
And, whereas organizations constantly hear and read that their board of directors should be the center of gravity for their fundraising—and often bemoan board members' lack of engagement—the Bright Spots engage non-development staff and volunteers just as actively as they do board members. Board members play an important role, but they are not viewed as more or less capable of fundraising as other stakeholders.

"Bright Spots" organizations don't view spreading the responsibility and work for raising funds across the organization as simply distributing a burden. Instead, they see fundraising skills as intrinsically valuable for all people doing social change work, not just those pursuing careers as professional fundraisers. For example, a number of Bright Spot see supporting young people of color to engage in fundraising as part of developing their leadership and lifting up their stories and experiences.
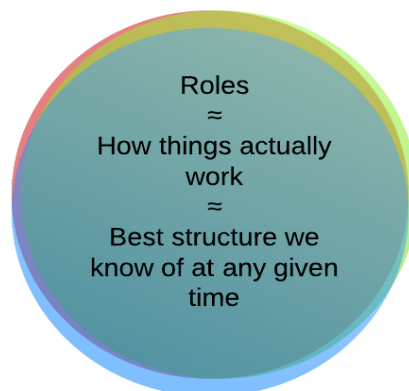
This broad distribution of effort has significant implications for the role of the development director, when there is one. Time and again, we heard from the development directors at these organizations that their job is to coordinate, to teach, to coach, and to inspire. These skills—skills that are very relational—are also deeply satisfying as they enabled staff, board, volunteers, and members to be successful fundraisers.
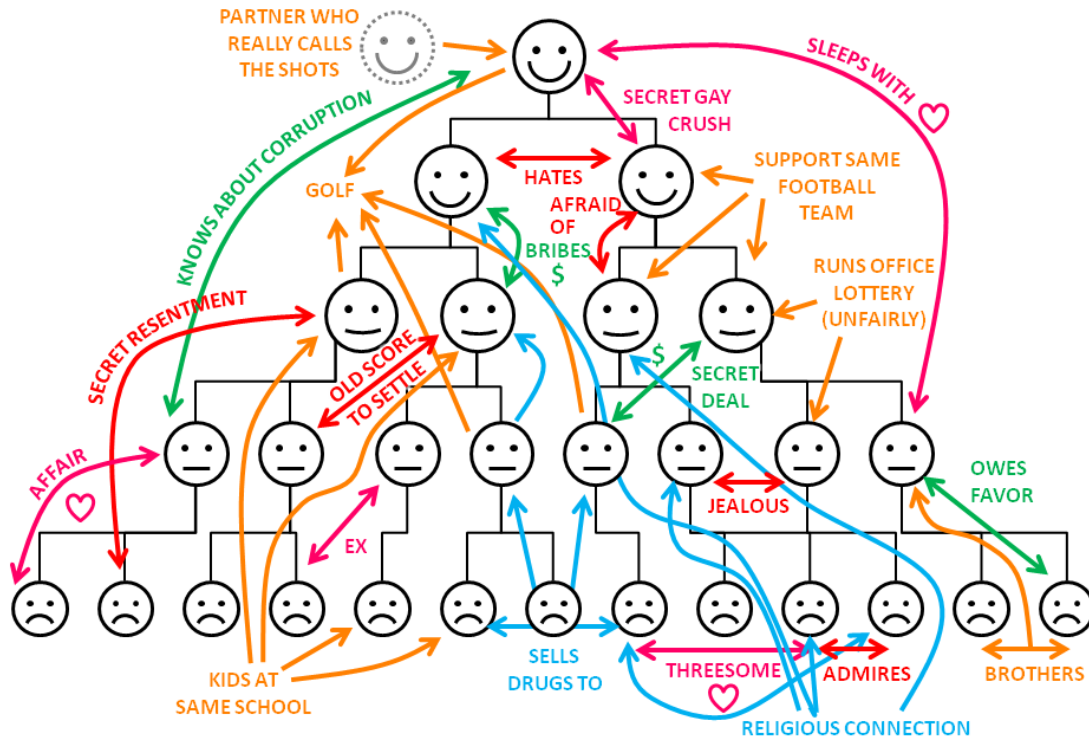
Roles & Structure

In Conventional Organizations

Formal Structure

Extant Structure

Org chart &
Job descriptions

How things
actually work

The ideal structure at
any given time

"Requisite" Structure

With Holacracy

Roles
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How things actually
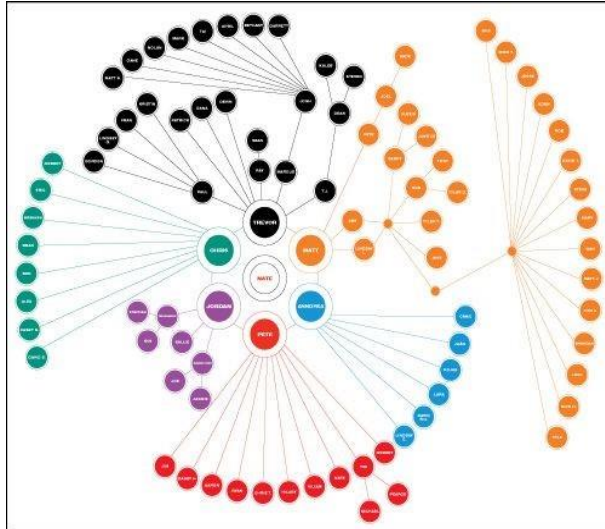work
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Best structure we
know of at any given
time

REAL ORGANIZATION CHART

What do you want your fundraising map to be?

Distributed Fundraising Model Archetypes

TYPE 1: Board as the Center of Gravity e.g. National Center for Lesbian Rights

- 600k raised by 30 people- NCLR board members, staff and former board members. Gifts of $1,500. and above.
- Campaign structure: Co-Chairs, Major Gifts Campaign Captains, Solicitors
- Raised over 3 months. October – December
- Solicitors send letters, follow on by email and calls to meet with existing donors who give > $1,500.
- Weekly check ins of Campaign Captains with Major Gifts Officer
- Fun Fact: There is NO "give or get" amount for board members.

TYPE 2: Significant Use of Volunteer Fundraisers Online e.g. Students for Farmworkers

- Train and support 50 program participants, alumni, donors and board members to raise $42,000 through online fundraising pages in short spurts, between 2 days to a week.

- 2 months before the campaign: Recruit 50 volunteers
- 1 month before campaign: provides training and materials to set up pages
- Frequent contact with volunteers so they are successful online fundraisers

TYPE 3: Staff Driven (different roles by team) e.g. Mujeres Unidas Activas

Mujeres Unidas Activas has experimented with matching work team roles with fundraising strategies.

-Organizing team identifies new supporters in their neighborhood outreach and work with small businesses.

-Direct services team calls lapsed donors because they are familiar with the personal stories of their members.

-Operations team reaches the annual supporters to renew.

-Directors steward and ask for major gifts.

TYPE 4: Donor Portfolio e.g. Jewish Voice for Peace
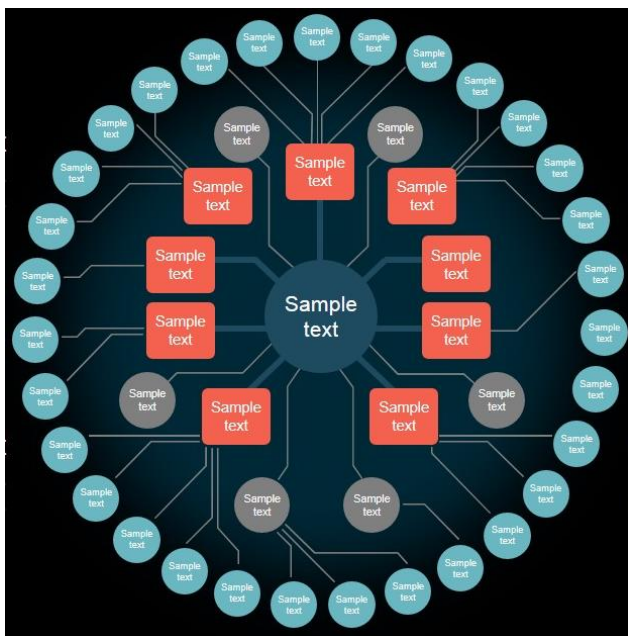
Jewish Voice for Peace (JVP) employs the portfolio system on an impressive scale in support of its major donor program. The organization has 57 portfolio managers from across the staff, board, and volunteers who together manage 600 major donor relationships in addition to other roles they play within the organization. "We all take seriously as organizers that our work is also to inspire people to build and sustain JVP," said Rabbi Alissa Wise, co-director of organizing, who has 30 major donors in her portfolio. With so many people so deeply engaged in fundraising and donor stewardship year-round, Development Director Ari Wohlfeiler sees his primary role as coordinator. Portfolios are assigned based on common interests and styles of the fundraiser and donors. It's relational and resonant when the fundraiser stays in touch with the donor throughout the year, makes periodic asks, and communicates personal thank-you's.

Distributed Fundraising Model Archetypes

TYPE 1: Board as the Center of Gravity (e.g. Natl Center for Lesbian Rights example)

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TYPE 2: Significant Use of Volunteers (e.g. Students for Farmworkers example)

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TYPE 3: Staff Driven (different roles by team) (e.g. MUA example)

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TYPE 4: Donor Portfolio (e.g. Jewish Voice for Peace's example)

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What's Your Ideal Staffing Structure?

Exercise:

Return to your work from session 1 and review:

1. Your "map" of current fundraising system

2. Your revenue model (noting who are the people who maintain, grow each revenue stream)

3. Where staff and non-staff such as board, donors, members, volunteers are located.
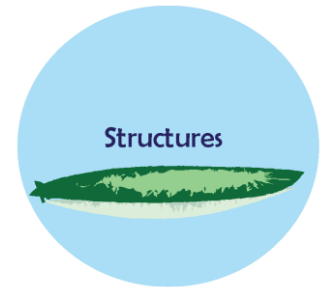
Discussion in your organizational team:

1. Name the specific places that distributed fundraising shows up in your organization (e.g. strategy creation, planning, and specifically in implementation – the activation of the strategy and the plan).
2. What changes or improvements do you want to make with your current fundraising staffing structure?
3. Within your development role, how can you share power & leadership more and support others in the system?
4. Draw a new map to show your desired/aspirational staffing structure OR, write it out below:

_____

_____

_____

_____

_____

_____

_____

_____

Competencies and Skills to Activate Aspirational Staffing Structure

Competencies are observable and measurable characteristics of a person that include using knowledge and demonstrating skills, behaviors, and abilities that contribute to performing well.

Development Directors are organizational leaders focused on skills building, culture change, and systems development to activate and support others in fundraising.
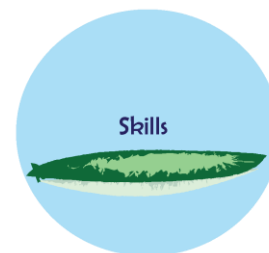
A competency can be a behavioral skill, a technical skill, an attribute (such as empathy, creativity or connectedness).

Sample Competencies	How it Contributes to Success
Ability to influence without authority	Working with volunteers and community members who do not "report" to me
Tact	Ability to partner with board members and others with positional power
Systems thinker	Being able to see and hold holistic, organization-wide perspective and how dynamics are playing out throughout the group
Coaching	Enabling, supporting, empowering volunteers and staff
Communications	Giving feedback, what worked, what didn't, clarifying expectations
Analysis	Interpreting and making meaning of data
Empathy	Understanding donors motivations, cultivating and building relationships with people
Other:	
Other:	

EXERCISE

Give Your Aspirational Staffing Model a Name:

_____

Core Competencies to Activate Your Model

Competencies - Strengths	Who in our organization has these competencies-strengths? How can we incorporate them into our development model?

Who is your "Talent Development" person?

Who's the right person in your organization to steward and integrate the system? What skills and authority do they need to succeed?

You can learn more about talents and strengths in your team, staff and board by taking the Strengthsfinder assessment tool, and having others assess themselves.

Right, Integrative Systems

Key systems that most organizations require for fundraising success:

Explicit: Tech and IT
- Technology and information systems for the collection, analysis and reporting of prospects and donors
- Evaluative data from program
- Financial systems
- Staff structures; fundraising roles across paid staff, board and volunteers. Work processes within the structure
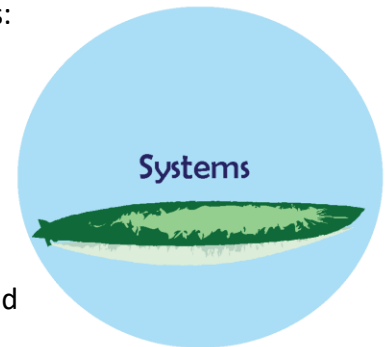
Implicit: People and Power
- Integration and alignment of communications & fundraising data
- Understanding power dynamics that exist interpersonally and across positions and roles throughout the organization- sharing power, distributing power
- Ways to activate "integrator" role(s): person or people that stewards the strategy, make meaning of data, support and provide leadership across the system

What systems do we have? How do we use them?

Name your systems	Name the key functions	How do you want to use this system to support future distribution?

What's Next for You?

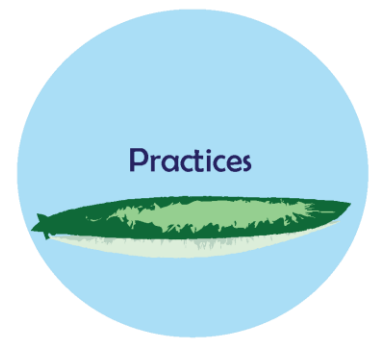**Before session 3, each team should complete the following:**

1. Continue to inventory/audit of current systems, create a list.

2. Assess each element that you currently have in place: Rate how well it is utilized for meaningful decision making:

   1 = utilized regularly

   2 = utilized sometimes

   3 = rarely utilized

   4 = never utilized

3. Connect with your Coach before session three.

4. Read the article by Yee Won Chong, *Insights of a Methodical Communicator: From Creating a Plan to Managing a Calendar.*

5. Scan the GFJ article archive to download topics you want to discuss in future session.

NOTES:

Fundraising Bright Spots Program
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