The Fundraising Bright Spots Program
Making Fundraising Work for You

SESSION TWO

DISTRIBUTED FUNDRAISING: LEADERSHIP ROLES AND SKILLS

OCTOBER 13, 2016

CompassPoint

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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.
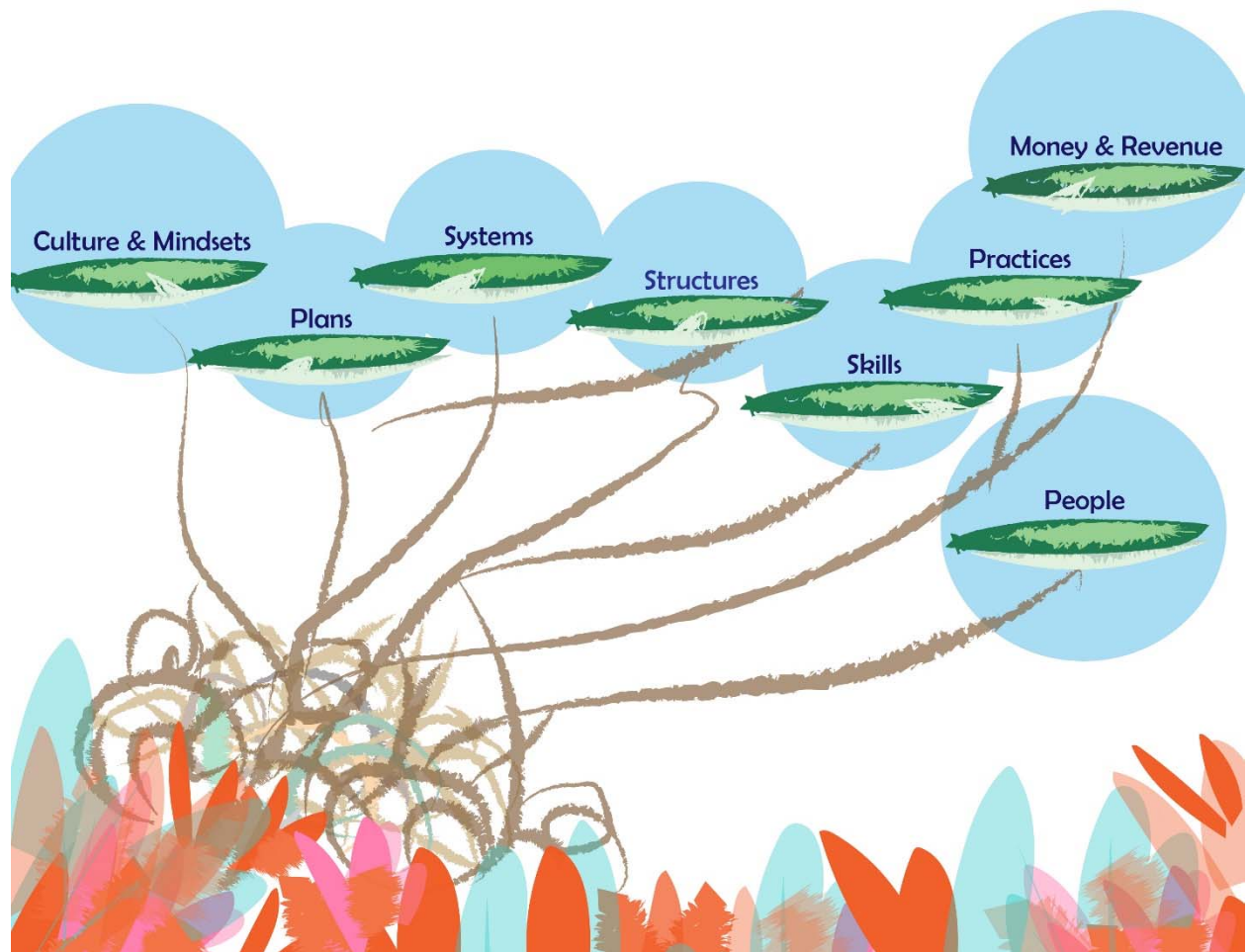
LEARNING AGREEMENTS

✓ **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 changes required of the people and systems within your fundraising system.

REFLECTIONS and LESSONS FROM LAST SESSION

In groups of 3 or 4 organizational teams:

- What did you learn about your organization's core identify and how it relates to your fundraising philosophy and approaches?
- What did you learn by completing the revenue model worksheet?

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Exercise on Money and Power

How can we disrupt certain behaviors and beliefs in fundraising?

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?

Reflection - notes: 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.

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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 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.
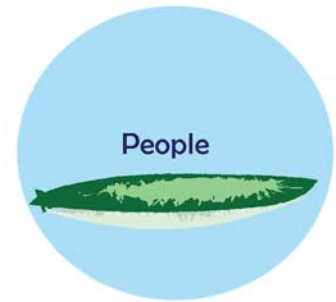
"Bright Spots" organizations don't view spreading the responsibility and work for raising funds across the organization as simply distributing a burden. Instead, they see fundraising skills as intrinsically valuable for all people doing social change work, not just those pursuing careers as professional 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.

Distributed Fundraising Model Archetypes

TYPE 1: Board as the Center of Gravity (e.g. Breast Cancer Action's 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 primary, secondary streams)

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 more and support others in the system?
4. Draw a new map to show your desired/aspirational staffing structure. OR, write it out below:

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Competencies and Skills to Activate Aspirational Staffing Structure

Competency Defined

Competencies are observable and measurable characteristics of a person that include using knowledge and demonstrating skills, behaviors, and abilities that contribute to performing well. A competency can be a behavioral skill, a technical skill, an attribute (such as empathy, creativity or connectedness).
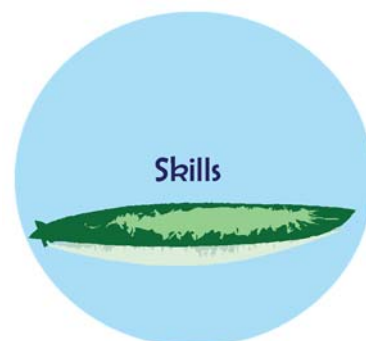
Sample Competencies	How it Contributes Success
Ability to influence without authority	Working with volunteers and community members who do not "report" to me
Tact	Ability to partner with board members and others with positional power
Systems thinker	Being able to see and hold holistic, organization-wide 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
Strategy	Envisioning, strategic thinking, seeing patterns and environmental cues
Empathy	Understanding donors motivations, cultivating and building relationships with people
Other:	
Other:	
Other:	
Other:	

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Consider an "Integrator Role" 🤔

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

EXERCISE

1. Give Your Aspirational Staffing Model a Name:

_____

2. Core Competencies to Activate Your Model

Sample Competencies	How it Contributes Success

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
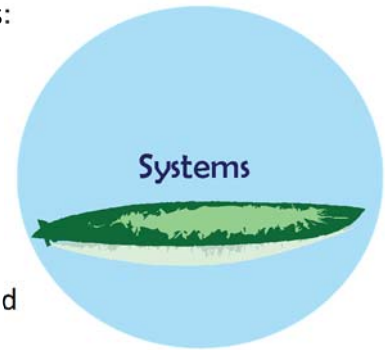
Implicit: People and Power
- Integration and alignment of communications & fundraising data
- Understanding power dynamics that exist interpersonally and across positions and roles throughout the organization- sharing power, distributing power.
- Ways to activate "integrator" role(s): person or people 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 are you actually using the system? How frequently?

What's Next for You?

Before session 3 each team should complete the following:

1. 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 Program Advisor 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. Optional: View this webinar ($20)

   Low-Tech Guide to High-Tech Communications & Fundraising Webinar on Demand

   A GIFT Webinar on Demand featuring Yee Won Chong. Untangle the confusing high-tech web to use essential tools systematically that integrate your program, communication and fundraising goals. Learn about best practices without the technobabble from a non-techie, advanced user. If you're part of a small communications and fundraising team and/or lack dedicated technology staff, this is the webinar for you!