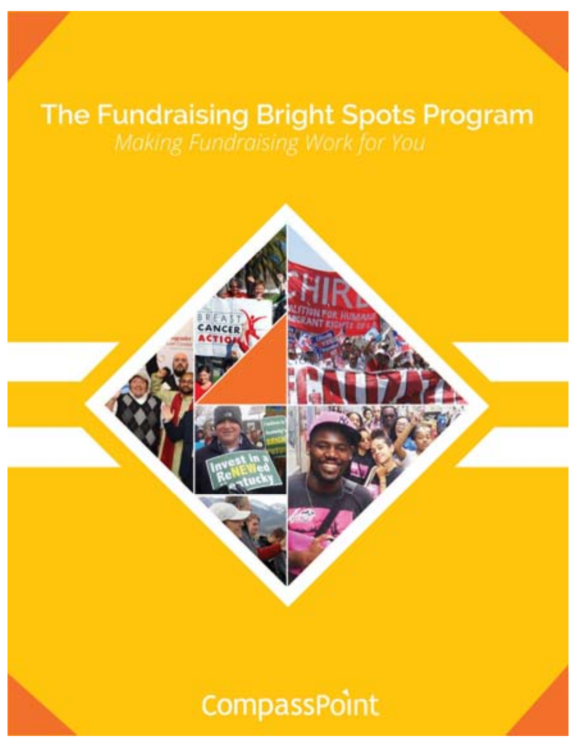
SESSION 3
Systems & Practices for Distributed Fundraising

September 14, 2017



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Agenda:

9:00 Welcome, Updates on Actions & Learning

9:15 Small group learning

10:10 Identify How People Use Development Data and Communications

11:30 Video conference presenter: Yee Won Chong

12:15 Lunch

1:15 Small group learning: Creating New Practices

2:20 Break

2:35 Pairs: Systems Planning

3:20 Energizer!

3:25 Leaders Clinic: Tapping the Community Wisdom

4:05 Next steps

4:25 Closing

4:45 End

COMMUNICATION AGREEMENTS for OUR LEARNING COMMUNITY

- ✓ **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

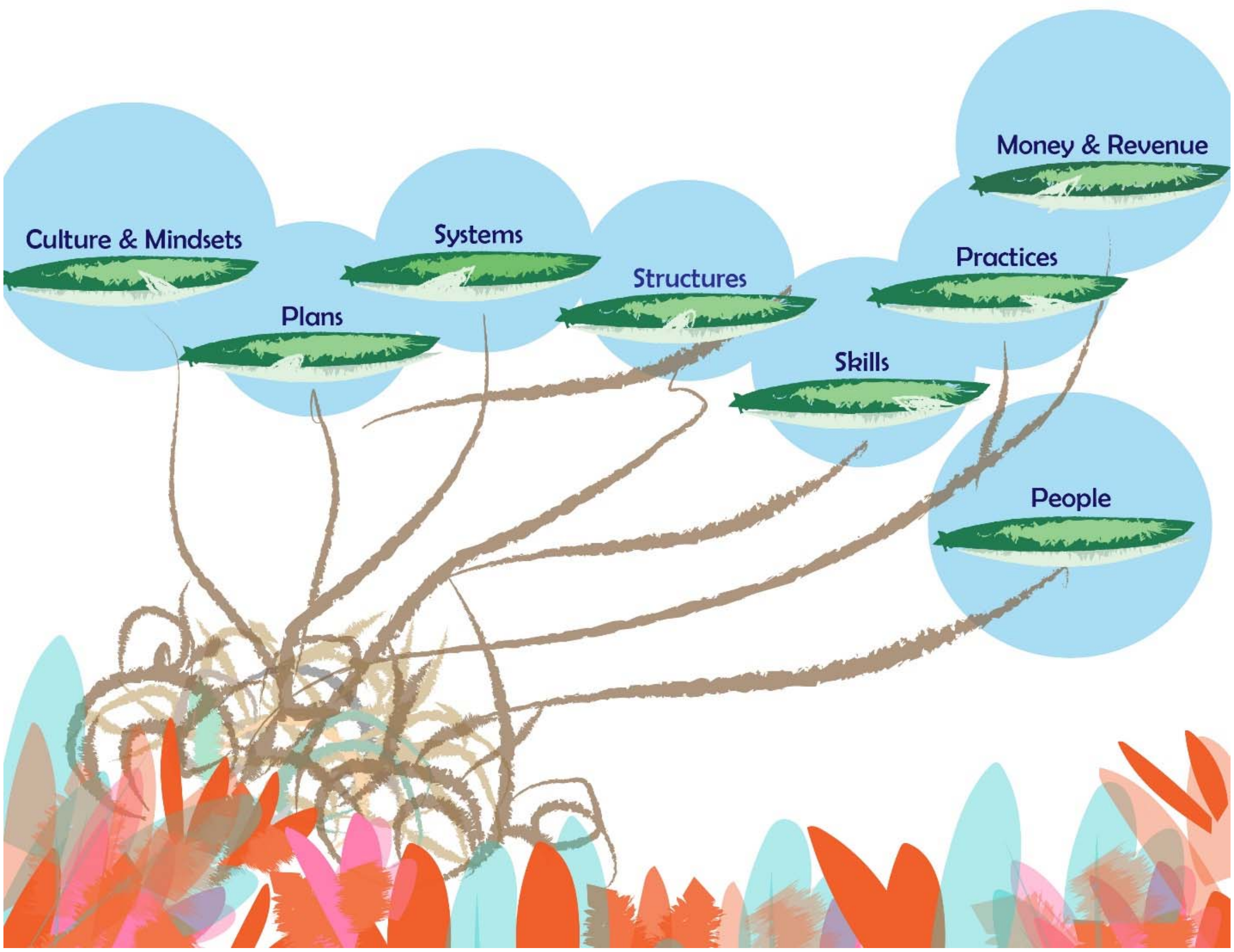
- ✓ **Embrace polarities**. Avoid binaries and embrace wicked questions (i.e. paradoxical truths), such as "How is it that we are an organization with a national identity and we are uniquely adapted to each local setting?"
- ✓ **Real play, not role play**. This space is an opportunity to practice meaningful 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 THREE:

Systems & Practices for Distributing Fundraising and Communications

Today's objectives: Through Bright Spots examples and peer sharing, learning we will:

- Share and identify uses of data that will support stronger development practices and distribution of FR.
- Consider how to distribute communication and development actions, supported by integrated systems, calendar.
- Identify at least 1 intentional practice your team will commit to.
- Build upon sessions 1 & 2 by learning how other participants are using the Bright Spots ideas and tools.



REFLECTIONS and LESSONS FROM LAST SESSION

Over the past month, were more staff, volunteers, and board members involved in communications and fundraising? (Identify any changes you made in your internal systems to support this)

Were specific people given specific roles to execute the fundraising? Who and what did you learn from that experience?

Has anything come up in discussions or actions re: power and fundraising? Is there more/less shared power connected to the recent fundraising?

Anything else that YOU have noticed about your approach to development since our last session in August?

NOTES:

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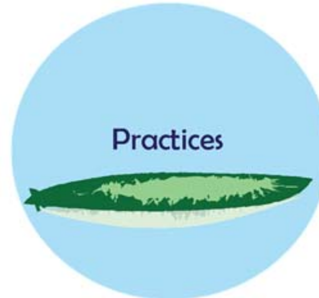
How You Use the Data



- What data do you look at regularly?
- What's one example of how regular analysis of data prompted a significant shift in a development approach?

How You Use Communications

- What's something that was more successful because of your organization's marketing and communications?

Insights of a Methodical Communicator

From Creating a Plan to Managing a Calendar

By Yee Won Chong

WHETHER WE CALL IT 2.0, the digital revolution, or the age of ubiquitous computing, the rise of information technology has resulted in nonprofits ramping up our communication efforts. There are many channels and platforms to consider, not to mention countless apps, add-ons and tools that help us to manage our communication tasks.

In this article, I share my three-phase process to develop my annual communication plan and manage a calendar that helps me cut the digital clutter. While these phases can be helpful when conceptualizing a communications plan, this process is not truly linear. As a communicator, I have to be aware of news headlines and trending topics to ensure that my communication is relevant. Planning and strategizing are not stagnant, terminable steps, but ongoing processes. I have to adjust at each phase to take advantage of new opportunities while still moving forward with my larger purpose.

STRATEGY PHASE

Success is often credited to good planning. When I was the development and communication director at Western States Center, I would gather my team in the last quarter of the fiscal year to plan for the following year. Depending on the size of your organization, this session may potentially involve all your staff.

I painted one of the walls in my office with whiteboard paint, one of the best "decorating" investments I have ever made. The wall gave us plenty of room for visual planning and brainstorming. With markers and Post-its in hand, we listed our top-level goals and their subsequent strategies on one end of the wall, and outlined our calendar at the other end.

Prioritizing Actions

We started by writing down "high stakes actions/events" in the calendar. High stakes actions are major activities, such as a fundraising event. If the communication plan fails for a high stakes action, the consequences are serious. Other examples include lobby days, high profile press releases, annual conferences and fundraising campaigns (see Project Management Basics sidebar on next page). Having high stakes actions on the calendar helped us identify months that are busier and months that were slower. For us, the slowest period was the last couple of weeks in August, right after our summer conference.

Next, we determined the timing of other routine actions—like certain website content updates, blog posts and monthly electronic newsletters. While these other actions are more routine, they are still important to the work. They are also movable on the calendar. Therefore, your high stakes actions help to determine the schedule and frequency of these movable, routine actions. For instance, it makes more sense to time your electronic newsletters to reach people when you want them to take an action, instead of sending your monthly e-newsletter on an arbitrary date of every month.

Naming the Audience

Our next step was to list the audience next to all the actions. Since your program team or development team may have already established the audiences for actions they are overseeing, you may be asking them to list them.

Having the audience listed on the whiteboard helped us to picture the communication "touch points" with our donors and constituencies. This visualization helped us arrange movable actions to ensure that our "touch points" were frequent.

Benchmarking and Evaluating Your Performance

My general philosophy is, don't do things that don't work. This seems obvious, but what defines "working" and "not working" is

PROJECT MANAGEMENT BASICS

While I have found the practice of professional project management to be more extensive than I need for my work, a few concepts and tools have been helpful, especially for managing high stakes actions. Before I go through some of these, let's define what a project is: a time-constrained activity undertaken to deliver a specified output within a specific timeframe using limited resources.[1] In the nonprofit world, projects are sometimes synonymous to campaigns. Projects are distinct from daily operations.

Here are a three project management tools that I've found useful in keeping every team member on the same page and on task.

Project Charter

I use a modified version of a typical Project Charter that outlines the goals, SMART[2] objectives, budget, benchmarks and responsibilities of each member of the project team (see RACI Matrix). This one-page document not only keeps all my team members on the same page, it also helps me to manage the overall direction of the project.

Gantt Chart

A Gantt chart is a document that lists the activities (rows) and the corresponding relevant dates (columns). It is used to track the start date, duration and the end date of an activity. I use a simpler version of a typical Gantt Chart to figure out the sequencing of activities. You can download an online Excel template, use an add-on app for Google Drive, or create one yourself.

RACI Matrix

A RACI Matrix is used to track the roles and responsibilities of project team members. RACI is an acronym and stands for:

- **Responsible:** Who is responsible for the execution of the task?
- **Accountable:** Who is accountable for the tasks, and who signs off on the work?
- **Consulted:** Who are the subject matter experts who need to be consulted?
- **Informed:** Who are the people who need to be updated of the project's progress?

1 Crow, Jeff. *Applying Project Management in the Workplace*, 5th Edition. Portland: Blackbird Publishing, 2006. Print

2 SMART stands for Specific, Measurable, Attainable, Relevant and Time-bound.

not always straightforward. This is where benchmarking comes into play. Benchmarking is the process of comparing a business's or organization's performance metrics to industry bests or best practices from other companies or organizations.

The *M+R Benchmarks Study*, published annually by M+R Strategies and NTEN, is the go-to reference for nonprofit online benchmarks. This study calculates the average rates of the approximately 50 nonprofits surveyed each year. Based on the study, you are in pretty good shape if your fundraising emails have an open rate of 12 percent and click-through rates of 0.45 percent.

Make it a practice to evaluate your performance after a project. Observe if certain content or the timing of your action increases or decreases open and click-through rates. Overtime, you will see a pattern and you will learn what to adjust to improve your numbers.

Another way to way to evaluate your performance is to interview or survey your audience. While surveys and interviews require more time, they are also effective relationship building tools.

DEVELOPMENT/DESIGN PHASE

Even though I am a visual thinker, the plan and calendar do not stay on the whiteboard wall for the rest of the year. Besides, it is too risky to have my erasable whiteboard as the only documentation.

Using Management Tools

I began this phase by transferring the notes from my whiteboard into a Word document. I fit the notes in a calendar chart that could be printed on one legal (8.5x14) or tabloid (11x17) size sheet of paper. This served as a macro tool to view the entire year. It was also a great reference for the following year's plan and powerful institutional history for future staff, now that I am no longer with the organization.

MAXIMIZE GOOGLE CALENDAR

Google Calendar is more than just a calendar tool. Here are a few of the other ways you can utilize it to its fullest potential:

Share the calendar with the entire staff. I add staff who are assigned to a specific task, like writing a blog post, to a calendar item so that it appears on their individual calendar as well as the communication calendar.

Track notes in the description box. At Western States Center, I kept track of topics for our e-news in the description field of the e-news calendar event. I would add topics if a story opportunity arose that we had not planned. This gave my co-worker who was in charge of publishing the e-news real-time updates. It was also far more efficient that sieving through emails and opening Word documents.

Assign tasks and set reminders. Once someone is given a task like writing a blog post, I share that calendar event with their individual calendar. Once it is in their personal calendar, they can set a reminder for themselves. This helps spread the responsibility of communications across the entire staff and allows each staff member to create the system of reminders that works best for them. Automatic reminders have helped me to sleep better at night!

Still be tactile. While I do rely on high-tech tools, I am also a tactile person. I often prefer using pen and paper to a computer. Electronic calendars still allow me to print a paper copy and scribe on it.

Shift movable actions around neatly. As a neatnik, I have found that physical poster calendars do not meet my standard of visual order. While using Post-it notes on a poster calendar is possible, the risk of them falling off is high. Electronic calendars keep everything looking orderly.

Search archive. Google Calendar has a powerful search function. If I need to look up the specific date for a certain action, it takes me only two seconds to find the answer.

I also transferred the notes into a management tool where I could track the details. This can be a spreadsheet, a Word document, a big poster calendar, an electronic calendar or a project management platform like Basecamp. I've also used Redbooth, Evernote and Teamwork.com. Pick one that everyone agrees on.

Google Calendar also worked well for my staff team. It enabled me to create a communications calendar separate from my individual calendar.

The accuracy of a system only matters if the system is actually used. Most importantly, pick a system that works for you and your team.

Persistence Pays

Even if everyone agrees to a specific tool, it still takes time for people to get used to it. New staff also need time to get familiar with the protocols. Do not give up just because you still need to remind people to check the calendar or use the features. Training and practice are essential for successfully adoption of a tool.

Create or Curate

If your organization is like most nonprofits, your staff are most likely stretched for time and resources. Consider curating, instead of creating, content. Curating is a process of selecting, organizing and presenting information on a particular topic. It is different from simply sharing or duplicating.

Curating is not only a great way to maintain frequent posting on social networks, it is also a way to collaborate with organizational partners and build good relationships with bloggers. For example, you can wrap up an action by compiling a list of contents such as blog posts, videos and pictures that you and your partner organizations have published. But do not just present a list, add context that connects to your work. And don't forget to attribute your sources.

IMPLEMENT PHASE

In this phase, I lean on my management tool to track my actions and tasks.

Use Your Tools!

I maintain the big picture by having upcoming monthly calendars on letter size paper in front of me, while staying on task by monitoring my weekly calendar on my computer. Reviewing the monthly actions, planning the weekly actions, and implementing the daily actions help me to stay on task.

Stay Grounded in Your Foundation

Your adrenaline may be pumping a little more during this implementation phase. Actions are happening and they're moving quickly. Remember to stay grounded on your foundation (see sidebar). Don't get distracted by what seems to be attention grabbing for the sake of receiving the most "likes" or retweets.

FOUNDATIONAL BLOCKS

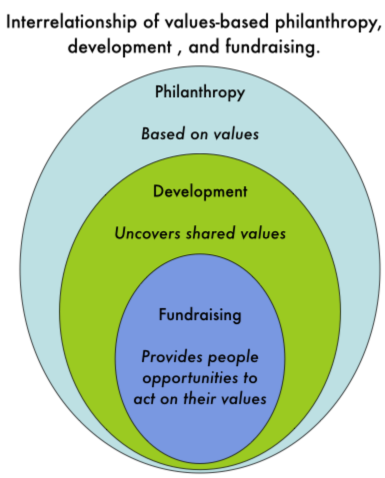
Staying focused on the purpose of your organization not only prevents mission creep, it also helps you avoid potentially embarrassing mistakes.

Rooted in Purpose

A manageable calendar is a sign of a good communication plan. A good communication plan should reflect a solid organizational plan. Whether your organization has a strategic plan or uses a strategic thinking process, your vision, mission, values and your theory of change should be embedded in all your strategies. They are not meant to live in a file folder or the cloud. Embed these statements in your work plans and carry them out in your daily conduct.

Communication is Development

In her book, *Beyond Fundraising: New Strategies for Nonprofit Innovation and Investment,* Kay Sprinkle Grace beautifully explains the relationship between fundraising, development and philanthropy. Development is not just a euphemism for fundraising. Fundraising is the act of asking for money. Development is the process of engagement and building relationship with your donors. Communication is an essential part of development. A good communication plan should also be clearly tied to your organizational fundraising and program plans.



Source: Grace, Kay Sprinkle. *Beyond Fund Raising: New Strategies for Innovation and Investment in Nonprofits. Second edition.* New York. John P. Wiley & Sons, 2005.

A colleague once dared me to post a clever tweet she wrote. It compared a health guide we were trying to promote with a gay hook-up service. While some people might have found it humorous, it turned out that this hook-up service also had a history of racial discrimination. The lesson: all that glitters is not gold. Always remember your larger purpose.

Delegate to Integrate

Communication may not be high on your program staff's priority list if your organization has not completely integrated the communications work into the larger organization. Again, do not give up. Persistence pays off in the long term. Gentle reminders and patience are essential ingredients for developing an integrated communication culture.

At the Center, I gave program staff clear, accessible roles (e.g., take pictures with your smartphone while you are at an event). I empowered them to post directly to our Facebook and Twitter pages. In the beginning, I monitored the activities closely to ensure that our message and language were consistent. I also provided feedback to improve our message consistency. Once the staff got used to it, I found myself monitoring less vigorously. Giving your staff clear roles is a good way to create an integrated communication culture and to increase the staff's feeling of ownership.

A communications system only works when you commit enough time to implement that system properly. Test things out so you can always adjust to your needs and your team's needs. Remember that planning, strategizing and implementing are not stagnant, terminable steps, but ongoing processes. The communications process is definitely not a linear process. I hope that these insights will help you create and manage a communications calendar that will lead you and your organization to even greater success. ■

For a compilation of resources that pertain to this article, including project management tools, visit: bit.ly/methodical-communicator

TYPES OF MEDIA: CHANNELS AND OUTLETS

Categorizing communication channels and outlets helps cut through mental clutter and clarify your top communication strategies. Below are two layers of channels and outlets from Altimeter. These are not universal definitions. You will come across other resources that may define these terms differently.

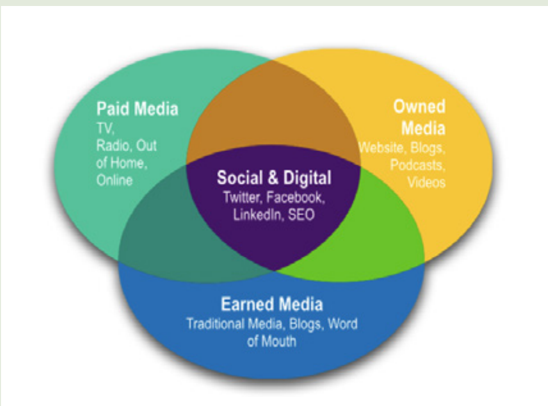
The channel and outlets you focus on depend on your organization type (advocacy, social services etc.), what your audience uses, and your staffing capacity.

Channels

One way to sort them out is by categorizing them into earned media (press), owned media (newsletters), paid media (advertising), and social media (social networks).

When I worked at United for a Fair Economy, earned media used to be synonymous with press media. This entailed building relationships with reporters and faxing press releases to newspapers, TV stations and radio stations. The democratization of information and the evolution of internet platforms have changed the game.

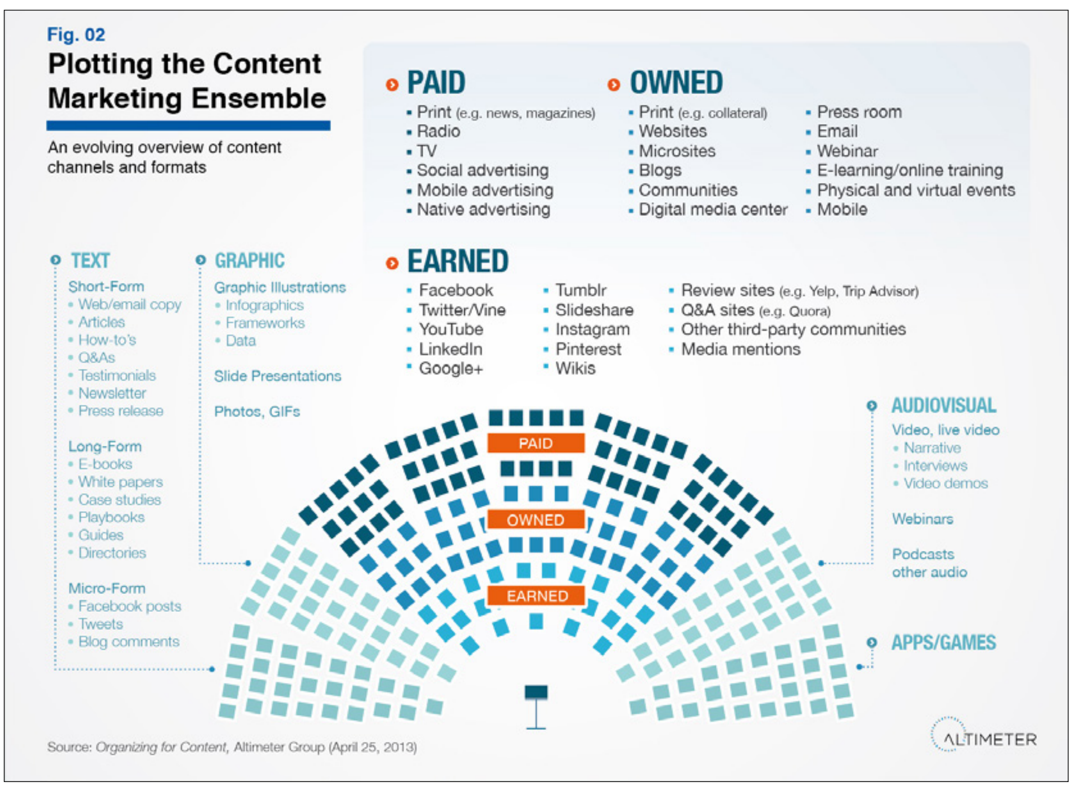
Newspapers and traditional airwaves are scrambling to stay relevant in this internet age. Reporters and news directors are no longer the only gatekeepers when it comes to getting your messages through the airways and web. The influence of followers and fans on social media plays a significant role in spreading your message. Social media has blurred the lines, creating overlaps that are well represented by this Venn diagram by Altimeter.

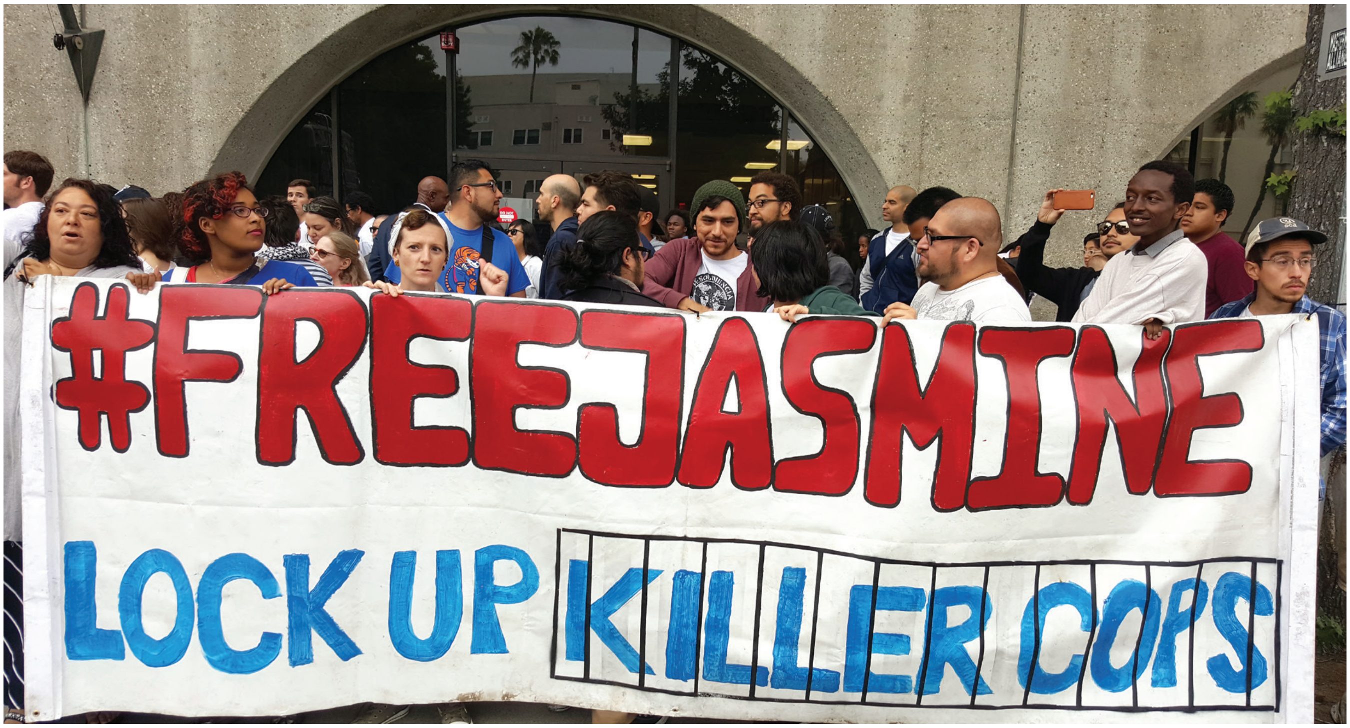


Outlets

Within these channels there are specific outlets (newsletters, specific social networks etc.).

I use Altimeter's categorization in my top level strategizing (getting first time donors to become annual donors) and Brandraising (see *Brandraising: How Nonprofits Raise Visibility and Money Through Smart Communications* by Sarah Durham) for specific tactics (organizing a phone bank to call first time donors to repeat their donations).





Color Of Change delivers nearly 80,000 petitions in front of Pasadena Courthouse calling on Judge Elaine Lu to free Jasmine Richards.

Strengthening Black America's Political Voice Through Online Campaigns & Fundraising

By Sheena Brown

COLOR OF CHANGE KNOWS THAT BY BRINGING PEOPLE together around targeted and strategic actions, we can create real and lasting change in the fight for racial and social justice.

Our work targets the symptoms and manifestations of racial injustice, and seeks to shift public opinion and policy, both through broad-based educational campaigns with our 501(c)(3) and campaigns targeting politicians and policy makers with our 501(c)(4).

Our strategies include digital organizing and public education efforts; a robust social media presence designed to expand both the impact and reach of our work; and broad-based educational campaigns. By ensuring that the voices of those most impacted by racial and social injustice are front and center, Color Of Change is building greater political power for Black people that can be sustained for generations to come.

Color Of Change was created in 2005 by a single email in a historic moment of crisis for the United States. Co-founders James Rucker and Van Jones launched the organization in the aftermath of Hurricane Katrina, when entire Black communities were abandoned by local, state and federal officials. People in crisis were treated as criminals instead of victims. Our co-founders realized that there was no national organization that was equipped to quickly and creatively lift up the voices of Black people in moments of crisis, particularly by using online platforms. Post-Katrina, Color Of Change was a major catalyst in raising the national consciousness about the life-and-death consequences of the invisibility of Black people and the silencing of our voices.

Our work is unified around a common purpose: elevating and amplifying the voices of Black people and our allies so that those in power understand that we will hold them accountable on policies and actions that impact our families, communities and lives.

Member Engagement

Today, Color Of Change has over one million members, making it the largest online civil rights organization in the nation. Color Of Change mobilizes the power of its members and allies—through social media, online activism, and grassroots organizing—to demand accountability and equity from political, corporate and other decision-makers.

There is a particular context to how and why our membership has grown over the years. We see spikes in membership during "flashpoint" occurrences of racial injustice. Be it when Trayvon Martin's killer went free, when Mike Brown was gunned down in the streets of Ferguson, or the horrifying massacre of nine Black individuals at Emmanuel AME Church in Charleston, SC, our members come to us to learn what they can do to make a difference.

Year	Percentage of member growth from prior year	Number of actions taken
2013	+3.8%	1,432,758
2014	+37%	1,939,497
2015	+12.5%	2,406,018

Color Of Change has developed a continuum of strategies and tactics to carry out its work at the intersection of civic engagement, economic justice, racial justice, and criminal justice including:

- **Rapid Response Engagement.** Using our online capacities to conduct rapid response campaigning, Color Of Change identifies and amplifies moments for galvanizing online and offline action. We connect multiple moments to create persuasive narratives and leverage specific truth-telling moments to shift critical momentum.
- **Social Pressure Engagement.** For example, in the aftermath of Walter Scott's murder, a donation drive was started on Indiegogo to raise money for Officer Michael Slager. Five fundraising pages had been created and initially, Indiegogo refused to take them down. Outraged, thousands of Color Of Change members flooded the Indiegogo Facebook page with comments demanding that they remove these disturbing and hurtful fundraisers from their platform, which enabled Officer Slager to profit from killing an unarmed Black man. Our members were victorious when Indiegogo quickly took down the fundraising pages.
- **People-Focused Media.** Because of our online organizing efforts and proximity to the media echo chamber, we are uniquely situated to push stories, issues and moments to the forefront of the media conversation. Color Of Change aims to lead with storytelling by developing people-focused media, spotlighting authentic, individual stories of Black folks —often Black women—across the nation to make our issues and our members impossible to ignore.
- **OrganizeFor.org.** Our distributive organizing platform is employed as a tactic to grow membership and spark greater participation by enabling local partners to turn their members into campaign leaders, and equipping Color Of Change members to recruit and mobilize their networks. The impact of this platform may include driving a neglected issue into the public discourse and keeping it there, or forcing key players to meet with organizers and answer questions they would otherwise ignore.
- **Represent.ColorOfChange.org.** The hub for all of our media accountability work, this site challenges media producers in entertainment, advertising and the news to take responsibility for their dehumanizing portrayals of the Black community.
- **Moments to Movements.** We connect multiple moments to create compelling and persuasive narratives, deepening our members' understanding of issues, political dynamics, and the ability of everyday people to make long-term impact through sustained activism.

We employ a ladder of engagement to leverage the full capacity of our members (see Figure 1 on next page).

Online Fundraising Success

Our online fundraising efforts are led and carried out through our campaigns team. The goals and strategies for our online fundraising are an important part of our email campaign work. This member-focused strategy is based on analytics that tell a different, yet important, story about how members engage and what inspires their giving. Our development department is gaining the necessary capacity needed to weave in more traditional cultivation and stewardship programs for our members. This dual approach both provides members with a framing for what action is needed, and aims to increase their longer term support of the organization—deepening their connection from supporting one-off campaigns to supporting long-term organizational sustainability.

Similarly, our development team is set up to piggy-back on the engagement momentum that our members experience. We want our campaigns team to remain focused on building and running hard-hitting, successful campaigns. Therefore, the development team brings that deeper layer of strategy and infrastructure to support member engagement through a more focused and intentional cultivation strategy. The development team can do the important work of building out what we call a "ladder of giving." Many of the asks coming through our campaigns are targeted at the $3 to $15 level, allowing our development team to review donor engagement, learn what's important to donors, and build a deeper connection that often motivates increases in donation amounts.

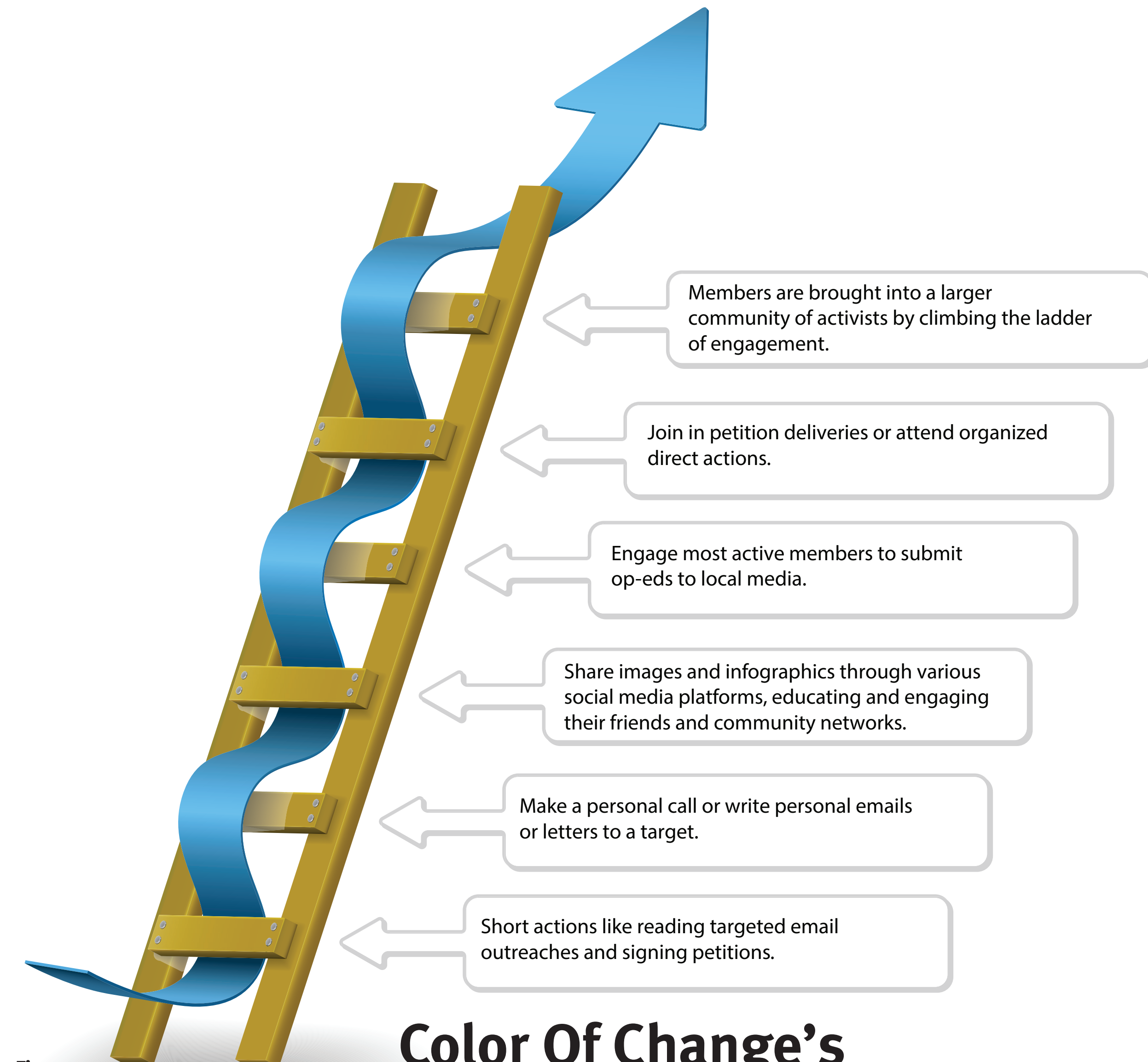


Figure 1

Color Of Change's Ladder of Engagement

In many instances, a donor's support grows beyond contributing to a few one-off campaigns each year to providing deeper core support that allows the work of the organization to flourish. That said, we are working on launching an events program to support our ability for more direct interactions between staff and members so that we can learn from each other. We are looking to hold two events this fall in NYC and the Bay Area, focusing on members who show consistent engagement through taking action or making donations.

In recent years, Color Of Change has exceeded our online fundraising goals. Nonetheless, we are certain that these achievements came as a result of many prior years of learning about our members, experimenting to find the right message, and recalibrating our strategies to engage folks more deeply. We still have a lot to learn, and could be doing a lot more if we had additional staff capacity. But we feel confident that we are on the right track to getting there.

Change in Online (Member) Fundraising Revenue 2013 - 2015	
2013	-41%
2014	+224%
2015	+54%

Team Fundraising Strategy

One of our core operating strengths as an organization is that we have clearly defined SMART (Specific, Measurable, Aspirational, Realistic and Time-bound) goals across the organization. The executive, development and campaigns team all have specific goals attributed to fundraising. The campaigns team uses data and analytics on member actions to inform their goals and strategies. They focus on those important low-dollar donations that come in as a result of a hard-hitting campaign. Our campaigns team is broken down into smaller issue-focused teams (criminal justice, economic justice, media accountability, etc.). Each issue team is responsible for reaching a certain fundraising target, and each member of the campaigns team has individual goals. Each set of goals is assessed on a monthly basis, and appropriate adjustments are made as needed to ensure individuals and teams stay on track to meet these goals.

The executive and development teams are focused on bringing in major donations and grants from individuals and institutional partners. Similarly, their goals are clearly defined, and they assess progress on a monthly basis.

Lessons Learned

Connect to hearts & minds.

Our members make donations when they understand our strategy and can clearly see how their donation is going to have a collective impact on an important issue. We have learned over the years that we need to educate our members not just on the issue we are trying to address, but also on how their donations help us to be successful.

A powerful example of this was a campaign we led around the tragic death of Sandra Bland in 2015. Essentially, we were learning from folks close to the Waller County, Texas criminal justice system that her death pointed to a deep-seated problem of corruption and racial bias that Attorney General Loretta Lynch is responsible for addressing. This type of "good ol' boys" culture exists in counties across the country and has long served as a way to ensure Black families and victims of state and interpersonal violence are denied justice.

We were able to build a good relationship with Sandra's family, and they supported our desire to invite our members to donate to our campaign. More than 3,000 Color Of Change members responded to our campaign[1] and donated approximately $73,000 in three days to fund a journalistic investigation into the policies and practices of Waller County officials. Part of the investigation's findings was published in the Huffington Post[2]. Our members received a clear message from us not only about the atrocities surrounding Sandra Bland's death, but how we could take collective action to create tangible change in Waller County.

The right messenger matters.

Sometimes, the issues we run campaigns on are not highly visible in the press, which can make it more challenging to engage our members. For instance, it was difficult in the beginning to get people to see what was at stake and stand with us on the issue of net neutrality. During a critical time in our campaign, we needed our members engaged and taking action. We partnered with #BlackLivesMatter Co-founder Alicia Garza to help raise the visibility of the FBI's surveillance of Black activists on the internet.[3] Alicia's high profile as an activist and public figure helped raise awareness of the issue and articulate the level of severity of this issue as a human rights violation. Our members got it and responded by contributing over $42,416 in just a few days to support our work on this important issue.

Pitch clear asks.

Our most successful fundraising asks come when we make very specific asks of our members. Our members look to us to help them manage their political lives. When we send an email out asking them to take action, it is important that we clearly lay out the crisis or opportunity and we are clear about how the action we are asking them to take connects to a solution. When we do this well their engagement soars. For example, in response to Glenn Beck spreading dangerous lies about Black people on his Fox News show, we let our members know that his contract was up in a month. In response, 285,000 members took action, putting pressure on Fox News to fire him, which they did.

Major Donor Strategy

As we continue to learn and improve our online fundraising strategies, we are working hard to build out our major donor program. Right now, we are defining major donors as individuals who make at least a one-time donation of $1,000 within a calendar year.

1 Visit bit.ly/1CSmOIQ to view the campaign page, screenshot on next page.

2 See huff.to/29Wm5um to read the article.

3 Read more about the campaign at bit.ly/1LcvXwf, screenshot on next page.

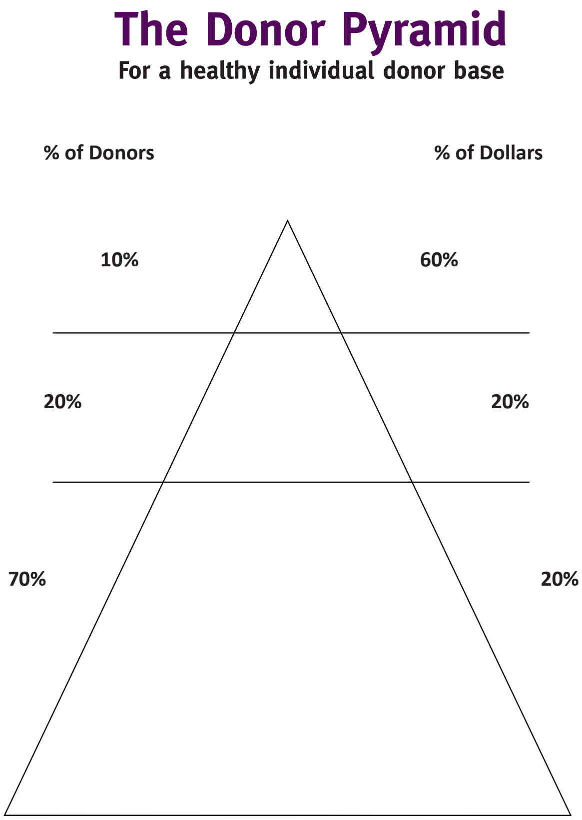


Figure 2: What "shape" is your donor base?
A base with no mid-level donors might be an hourglass. A base with no high-level donors might a trapezoid. A base with no small-dollar donors might be a truncated triangle. Determine your "shape" and figure out next steps to get it closer to the pyramid above.

Color Of Change's #JusticeForSandy and Net Neutrality fundraising campaign pages.

Landing on the right definition of a major donor for our organization required thoughtful considerations. Some organizations have robust donor programs that represent depth at many levels of a donor pyramid (see Figure 2 above). The base of our pyramid was plentiful with those who give between $50 to $250 per year. The top tier of our pyramid represented a handful of individual donors who were making contributions over $10,000.

In prior years, Color Of Change has lacked the staff capacity to dive more deeply into a major donor campaign as it takes significant focus and intention. Today, we are setting out to do just that. We aim to learn more about those $100 donors and understand if they have the capacity to make substantially larger donations one day. We expect that over time we will be able to bring more donors into a higher tier of giving. For now, the executive, development and campaigns teams are employing an all hands on deck approach to our overall fundraising efforts.

It is an exciting time to be in a building out phase for the development team. Our members are engaged with what is happening in the Black community, particularly as the world watches us address the issues around community policing practices. As we continue to help our members effectively respond to injustice with action, we are developing opportunities to encourage their ongoing financial support. Color Of Change has a unique ability to see opportunities others may have missed and make the strategic moves we need to make, until justice is real.

We have a rich and deep grassroots donor environment that holds tons of potential. Every day our campaigns team is improving upon their fundraising skills as they learn more about what sparks our members' responsiveness. When I think about what success looks like in two to three years, Color Of Change has a robust events program in three to four cities; our major donor program represents 35 percent of our individual giving program; and, our base of grassroots donors make consistent annual contributions that represent 40-60 percent of our individual giving program. Wish us luck! ■

Sheena Brown serves as the development director at Color Of Change, leading the organization's efforts to strengthen its relationships with supporters and donors to secure the financial sustainability of the organization.

Small Group Sharing:

- What practices did you hear Yee Won describe from their article?

- What important data points are described in the article about Color of Change?

- What success have you had in introducing a new practice around using data or involving others in your groups' communications? What challenges?

- What would it take for you to create a new practice in how you use donor data, or how you organize communications and engage people in that system?

Bright Spot Organizational Mindsets

Mindsets about fundraising discipline prevalent across the 16 Bright Spot Organizations were:

- More important than having a perfect system is working whatever system you have with a stance of rigor and continuous improvement. Consider using the “Fundraising Experiments” form to stay in an intentional learning mode.
- Development and communications are inextricably linked; compelling, authentic communications are a powerful way to acquire, engage, and retain donors.
- The use of data is not just about having a door database. It’s also surveying your donors; it’s getting feedback from your fundraisers on what messages are resonating; and it’s studying the performance of every fundraising campaign and event.

In Pairs: Systems Goals & Making Changes

- What do you already have in place, how are you using the system development, communication system?
- What shifts, changes are important to make?
- What can you start in the next week?
- What do you need from each other, and in the org to make those shifts?

In pairs: What Will Your Team Try this Year?

Consider committing to at least 1 new practice in any of these areas.

We will use/analyze _____________ data more regularly…

____

____

____

____

We will involve staff in _______________ more consistently…

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____

____

We will build relationships with donors in this way…

____

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What do we need to remind each other as we start these new practices?

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FUNDRAISING EXPERIMENT WORKSHEET

An experiment is methodical procedure designed to verify, falsify, or establish a hypothesis or set of assumptions. This worksheet is designed to help you think through and plan an experiment related to fundraising.

Goal of the Experiment:

Example: Retain current direct mail donors at a lower cost.

Description of the Experiment:

Example: Send email appeals rather than snail mail appeals to current donors for whom we have email addresses.

Our Assumptions:

Example: SAF donors are willing to give through email and will give the same amount through email as they do through direct mail.

It will take less time and cost less to send fundraising appeals through email rather than mail.

Data to Track:

Example

1. *# of donors (new and retained)*

The Plan of Action:

Action Step	Responsible Person	By When	Resources and Information Needed

The Results (what happened and why):

Homework for Session 4: November 8, 2017

- Read Beth Rayfields article: "*If You Build it They Will Come…*" http://www.grassrootsfundraising.org/2017/07/if-you-build-it-they-will-come-creating-a-culture-of-fundraising/#comment-118361

- Read overview of Wheel of Change: http://stproject.org/wp-content/uploads/2014/09/wheel-of-change-model.pdf

- Consider what you want for your next coaching session and schedule with your coach. You can schedule up to two coaching sessions between now and when we meet again on November 8th.