



FUNDRAISING BRIGHT SPOTS:

STRATEGIES AND INSPIRATION FROM SOCIAL CHANGE ORGANIZATIONS
RAISING MONEY FROM INDIVIDUAL DONORS

By Jeanne Bell and Kim Klein

This paper is one of a set of reports commissioned by the Evelyn and Walter Haas, Jr. Fund to address chronic fundraising challenges highlighted in the 2013 *UnderDeveloped* report. That report, produced in partnership with CompassPoint, gave voice to widespread frustration and raised the question, what now? In response, the Haas, Jr. Fund engaged a group of creative and respected experts to help us explore potential solutions. The Resetting Development work group looked at the issues from different angles:

- What can we learn about the “culture of philanthropy” as a way of breaking the vicious cycle of underdevelopment?
- What can we learn from organizations that are beating the odds?

Both reports can be found on the Haas, Jr. Fund website: www.haasjr.org



CompassPoint intensifies the impact of fellow nonprofit leaders, organizations, and networks as we achieve social equity together.

We are a national, nonprofit leadership and strategy practice based in Oakland, CA. For over 40 years, we have strengthened nonprofit leadership and supported organizations and movement networks to adapt and operate strategically. We also collaborate with fellow capacity builders and regularly share research and tools with the field at large. We invite you to review our theory of change to learn more about our stance and approach to this work. In short, we view leadership development and capacity building as means to accelerating social justice.

KLEIN & ROTH CONSULTING

Klein and Roth Consulting helps organizations build a broad base of individual donors. Our practical, hands-on advice is grounded in social justice values. We have extensive experience working with non-profits across the

United States and internationally. While we work with a broad range of organizations and issues, most of our clients have budgets of less than \$2 million and boards comprised of their constituency. We have a great deal of expertise working in low income and marginalized communities, with progressive causes and controversial issues, as well as fundraising in rural communities, for start-up organizations, and organizations moving away from reliance on foundation dollars.

FOREWORD

How can we build a loyal cadre of new and repeat individual donors? How can raise our game when it comes to fundraising? How can we bring in the resources we need year after year to sustain and grow our programs?

These are questions on the minds of nonprofit leaders across the country.

In the search for answers, nonprofit leaders often turn to consultants and other experts, or reach for the latest new tactic purported to improve fundraising results.

But what if the real answers to nonprofits' fundraising challenges were already all around us? What if we could identify and capture the stories of organizations that are uniquely successful in their fundraising? What if we could learn from these organizations what's working—not so we can copy their strategies and tactics but so we can get a better sense of the beliefs, values and organizational cultures that create the conditions for fundraising success?

These were the questions that prompted the Evelyn and Walter Haas, Jr. Fund to commission this report. In the following pages, the experts at CompassPoint and Klein & Roth Consulting explore how a select group of social change organizations are beating the odds to achieve breakthrough results in individual giving. Looking across these fundraising Bright Spots, the report documents the deeper attributes that allow these organizations to excel—the mindset that drives their fundraising, the day-to-day practices and habits of their people, their organizational cultures, the systems they rely on, and more.

This report is part of an effort we launched in 2015 after working with CompassPoint on *UnderDeveloped*, which documented the chronic fundraising challenges facing nonprofits today. The goal of the current Resetting Development effort is to “learn out loud” about how to break out of these challenges and help put the sector on a surer path to sustainability and long-term success. The Resetting Development work group has also produced *Beyond Fundraising*, a paper by Cynthia Gibson exploring what it means to build a “culture of philanthropy” in a nonprofit organization, available at the Haas, Jr. Fund website: www.haasjr.org.

We thank the research team from CompassPoint and Klein & Roth for producing a fascinating and insightful piece of research that we believe is a vitally important contribution to the field. While the focus of this report is on social change organizations, we believe many of the takeaways apply equally to other types of nonprofits as well—and we encourage others to look for Bright Spots in the fields and communities in which they work.

Peer-to-peer learning can be a powerful driver of change. We hope that the stories and the observations in this report help move the field to a better understanding of some of the cornerstone elements of fundraising success.

Sincerely,
Linda Wood
Senior Director, Haas Leadership Initiatives
Evelyn and Walter Haas, Jr. Fund



ABOUT THIS RESEARCH

So much of how we approach improvement in our culture and in our organizations is by focusing on what's not working. When it comes to improving fundraising in the social sector, perhaps it's time to pay more attention to what is working.

In 2013, *UnderDeveloped: A National Study of the Challenges Facing Nonprofit Fundraising*, gave voice to more than 2,700 executives and development directors across the country who had *a lot* to say about what hasn't been working: the short, frustrated tenures of development directors, the lack of engagement in fundraising by executives and board members, and unclear expectations about who is supposed to be asking people for money.

For many, these challenges seemed endemic and insurmountable—particularly as they relate to establishing and growing an individual giving program that provides essential unrestricted support to their work over time. But, of course, there are organizations enjoying success in raising money from individuals—and it isn't only universities and other large, mainstream institutions. We regularly run across progressive organizations with limited budgets and small staffs that nonetheless have robust individual giving programs. In the spirit of what's called “positive deviance,”¹ we decided to study 16 of them.

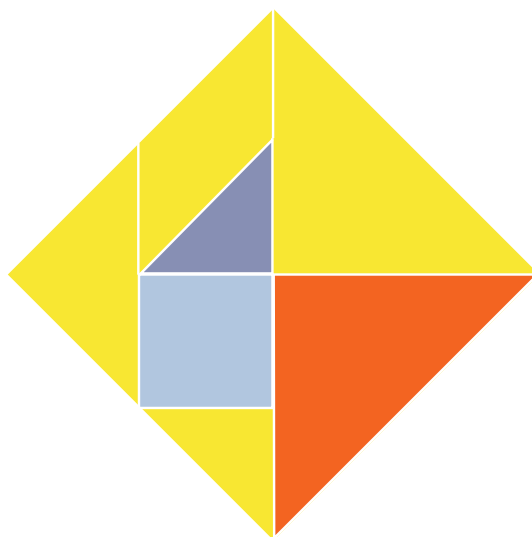
In addition to reviewing their individual fundraising performance over the last three years, we did in-depth interviews with their staff, board, and donors to glean the essential ingredients to their success. We are calling them fundraising Bright Spots. None of these organizations is perfect, and there are many more we could have studied. But we believe that we have identified a group of organizations that are sufficiently diverse in size, issue area, business model, and geography to provide a good sample for the field as a whole. Their stories, taken together, inform and inspire us. Instead of focusing on what doesn't work in individual fundraising, in this report, their tireless efforts show us what does.

¹ **Positive deviance (PD)** is an approach to behavioral and social change based on the observation that in any community, there are people whose uncommon but successful behaviors or strategies enable them to find better solutions to a problem than their peers, despite facing similar challenges and having no extra resources or knowledge than their peers. (Wikipedia)

ABOUT THE FUNDRAISING BRIGHT SPOT ORGANIZATIONS

The 16 organizations included in this report all have a deep commitment to and strong track record with raising money from individuals. Combined, they raised more than \$14,500,000 from individuals in 2014-15. For many, their individual giving programs are complemented by support from foundations, government, or both; for others, individual giving is nearly the totality of their revenue. In all cases, individual support is a consistent part of their overall revenue strategy and, as the report details, part of a broader organizational identity. At the back of this report, you will find more information about the organizations and some additional insight into what makes their individual fundraising program bright. Of note, as part of their movement-building orientation, several of the organizations make little or no distinction between donors and members, looking holistically at all of the support they garner from individuals annually.

The Fundraising Bright Spots use a wide range of tactics, but the commonalities in their mindsets about individual fundraising—outlined in the report to follow—are striking.





BRIGHT SPOT FINDINGS

While each of these organizations is unique, we looked for prominent patterns across the group. What we observed is captured in four large themes:



**Fundraising
is Core to the
Organization's
Identity**



**Fundraising is
Distributed Broadly
Across Staff, Board
and Volunteers**



**Fundraising
Succeeds Because
of Authentic
Relationships
with Donors**



**Fundraising is
Characterized
by Persistence,
Discipline, and
Intentionality**

In this report, we draw from the diverse stories of the Bright Spot organizations to bring each of these themes to life. These are not plug-and-play concepts; rather, they are powerful organizational stances that manifest in diverse ways across the organizations. The Bright Spot examples suggest what can be accomplished when organizations establish a philosophy and accompanying mindsets about fundraising rather than skipping straight to fundraising tactics. In sharing their stories, we hope to inspire other organizations to find their own authentic approach to fundraising.



#1 FUNDRAISING IS CORE TO THE ORGANIZATION'S IDENTITY

"I encourage other organizations and leaders to feel a confidence and a comfort in focusing on what you do and how you do it and to trust that that will connect you with other likeminded people."

—Karuna Jaggar, Executive Director, Breast Cancer Action

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

FUNDRAISING IS CORE TO IDENTITY

SPOTLIGHT: As a membership organization, **Kentuckians For The Commonwealth (KFTC)** held member engagement as core to its identity from its inception. But long-time Executive Director, Burt Lauderdale points to a pivotal organizational retreat in 2004 when they applied their collective decision-making philosophy—long used to set their political agendas—to the question of their business model and fundraising. He recalls two staff members making up a lovingly self-critical song with the refrain: “We always remember our goals in September.” In other words, their individual fundraising program was still inconsistent and budget-driven rather than year-round and integrated. During the retreat, staff and volunteer leadership weighed what they called Option A and Option B for the organization’s future. Option A was getting bigger and more influential as an organization through increasing membership and building a much stronger individual giving program. Option B was to hold steady and continue to establish KFTC as a force to be reckoned with. Option B also meant relying on a high degree of foundation support.” Burt recalls, “The group



voted very nervously for Option A, and we set out on a three-year plan, which we actually exceeded, to grow from 2,200 to 5,000 members and from \$65,000 to \$200,000 in individual donations. Really, what we did was apply to fundraising everything we knew about organizing.”

Applying their organizing philosophy to fundraising in the months and years following that 2004 decision, according to development director Amy Hogg, meant not separating fundraising and membership. “We want the organization to be owned by its members; membership is our objective and fundraising flows from that.” KFTC doubled membership and tripled grassroots fundraising in three years by tapping its campaign and organizing strengths. “We had very specific goals that people checked in about at every staff and board meeting,” recalls Amy. “There was a lot of communication and accountability.” ★



FUNDRAISING IS CORE TO IDENTITY

SPOTLIGHT: **At the Crossroads (ATC)** has a deeply held organizational philosophy of respecting the individuality of the homeless youth in San Francisco with whom they work. “We believe in our clients’ ability to identify their own path to happiness and fulfillment,” says Executive Director Rob Gitin. That ethos informed their decision not to take programmatically restrictive government funding from the start, for instance. But Rob remembers a conversation with his cofounder Taj 17 years ago when she made a joke comparing their clients’ asking for money on the streets to their own fundraising. “I knew she was kidding, but it bothered me,” Rob recalls. “What we realized is that we had never really talked about our fundraising philosophy. So we talked until 3 AM and what emerged is that one of our core



tenets with our clients is building long-term, trusting, non-agenda-driven, unconditional relationships. And, through those relationships we are trying to help our clients identify and achieve their own goals. At the end of that conversation we realized that is the exact same way we want to work with our donors. Once we had that light bulb go on, it changed everything.”

Treating clients and donors as individuals is fundamental to the fifteen street walks Rob leads each year for current and potential donors and board members. Unlike traditional fundraising approaches that focus only on positive outcomes, according to Rob, “the street walks are not in my control.” “Sometimes we run into kids who are doing well, other times not. So it’s real and honest.” ATC donor John Crary recalls Rob beginning a street walk through a tough neighborhood by saying, “There are a few rules. If I say run, run!” The real-deal, un-programmed aspect of the walks can be very powerful, especially compared with a slick PowerPoint or video. “We try to avoid the cliché success story trajectory. That disrespects clients and the incremental and nuanced work that ATC does,” says Rob. “We’re trying to be honest about the nature of our clients’ lives and our work. We want to honor and value the real accomplishments of clients and staff.” ★





FUNDRAISING AS ORGANIZING

In addition to KFTC, we interviewed the leadership of four other statewide, multi-issue advocacy groups. From all of these groups, we learned that organizing, building a membership, and fundraising are not distinct endeavors.

“Our membership and donor base are the same thing. It’s about reaching out and inviting people in.”

—Katie Bryan, Iowa Citizens for Community Improvement

“We don’t have a development director. We tried that before but it seems to separate out fundraising from organizing and that’s not what we want. They’re all the in the same house.”

—Bob Fulkerson, Progressive Leadership Alliance of Nevada

“Building power and building the base—organizing is the absolute basis of everything we do. Our organizers make recruiting members and developing leaders key parts of every issue campaign.”

—Caleb Lande, Northern Plains

“The long-term goal is to break down the silos of donors and activists.”

—Nic Swiercek, Nebraska Appleseed

For KFTC it is organizing that inspires their approach to fundraising. For At the Crossroads, it is extending to donors the organization’s unique approach to client relationships. For another Bright Spot organization, Breast Cancer Action (BCAction), it is their stance as a “watchdog for the cancer movement.” BCAction was the first and remains one of the only national breast cancer organizations that does not accept funding from entities that profit from or contribute to cancer, including the pharmaceutical industry. Their *Think Before You Pink* campaign inspires their constituents to get involved and donate but wouldn’t resonate at all for more mainstream pink ribbon breast cancer donors.

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

BRIGHT SPOT ORGANIZATIONAL MINDSETS

The following mindsets about fundraising and organizational identity are prevalent across the 16 Bright Spots:

- ★ **The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational values.**
- ★ **Being genuine about who you are and what you stand for as an organization is core to fundraising success.**
- ★ **Fundraising is a form of organizing and power-building, not merely a strategy for financing the organization’s work.**



#2 FUNDRAISING IS DISTRIBUTED BROADLY ACROSS STAFF, BOARD, AND VOLUNTEERS

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

—Angela Moreno, Interim Executive Director, FIERCE

The *UnderDeveloped* report revealed many organizations are caught in a vicious cycle of thinking 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 do not have a development directors in fact. There is a remarkable distribution of fundraising across staff, board, and volunteers, often with the use of 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.

FUNDRAISING IS DISTRIBUTED BROADLY

SPOTLIGHT: At **Coalition for Human Immigrant Rights of Los Angeles (CHIRLA)**, every staff member is engaged in fundraising. Development Coordinator Tanya Gonzalez recalls, “I knew from the beginning, even in the hiring, that everyone was expected to fundraise. I have to, and everyone else does too. So I was ready for it and able to adapt quickly.” This shift in organizational culture and expectations has been long and intentional, according to Development Director Beth Rayfield. “We faced the same barriers that all fundraisers face: cultural understandings about money and asking for money; feeling comfortable asking people in your personal circle for donations; asking low-income folks especially.” Beth has reframed the issue of raising money from low-income people for CHIRLA



staff. “You can’t take their choice away,” she says. “You are taking away someone’s dignity if you don’t ask them and give them the choice to say yes or no.” Now the culture and systems at CHIRLA enable leadership to expect everyone’s involvement. “It’s about having all staff feeling engaged and bought in. And, if you work here, the expectations and goals cannot be sidestepped and they are not negotiable.”

According to Beth, the key to engaging all staff is to focus and support their efforts. “Our director-level staff are engaged very broadly, but for the rest of our staff, we engage them in two fundraising vehicles a year: our gala and our membership drive. People 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.” One strategy CHIRLA uses for staff-wide engagement is friendly competition. Last year a CHIRLA intern created a Super Mario Brothers-inspired game, which was displayed on the wall and tracked everyone’s progress. There were prizes and lots of recognition for the three top staff fundraisers. Interestingly, Beth finds that the finite, tangible goals of these fundraising drives are a nice complement to the 10-year legislative battles that characterize the majority of their work. “There are very few things we do at CHIRLA where the feedback on progress is so immediate. With fundraising, we know if we are on track every week.” ★



FUNDRAISING IS DISTRIBUTED BROADLY

SPOTLIGHT: **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. This way, 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. “My job is to help people maintain relationships, and



to stay on calendar. I have been a development director before, but at JVP I spend more of my time coordinating than raising money to much greater effect.” ★

SPOTLIGHT: For **Mujeres Unidas y Activas (MUA)**, a memorable moment in the journey to deeper staff and volunteer engagement in fundraising was when Co-Executive Director Andrea Lee brought in a cartoon depicting a man who died because he asked for a contribution and the donor said no. The sheer ridiculousness of that scenario took away some of the fear of asking. According to Co-Executive Director Juana Flores, “Once we realized that we were actually doing a favor to the donor by providing them a way to give to a cause they cared about, that’s when our minds started to shift.” They too use a portfolio system: the management team members are expected to spend at least three hours per week on individual giving and together they steward 125-175 major donors. And beyond the management team’s major donor work, MUA has recently divided their staff into three fundraising teams. One team focuses on maintaining relationships with existing donors that give between \$100-\$250. Another team is focused on re-engaging lapsed donors. And a final team is focused on identifying and cultivating relationships with prospective donors. All staff is responsible for supporting MUA’s annual event fundraiser through the solicitation



of sponsorships, ticket sales, and silent auction items solicitation. “Each month at a staff meeting,” said MUA Grassroots Fundraiser Lulu Reboyoso, “we talk about the fundraising plan and how it’s going, about the importance of fundraising, and about the role that all staff have regardless of their specific position. We even take time to do donor follow-up calls together there in the meeting.” ★

These 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 other Bright Spot organizations like FIERCE and Student Action with Farmworkers 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. The individuals in this role are highly relational and they take deep satisfaction in enabling staff, board, volunteers, and members to be successful fundraisers. KFTC's development director, Amy Hogg, explains: "My primary job is leadership development. Leadership development is the first among equals of all of KFTC's strategies. Without leadership development of staff, board, and members, none of our other strategies are possible."

BRIGHT SPOT ORGANIZATIONAL MINDSETS

The following mindsets about distributing fundraising broadly are prevalent across the 16 Bright Spots:

- ★ **Fundraising is not the purview of a select group of professionals, but a process, if well-supported, that anyone can engage in.**
- ★ **Development directors are organizational leaders focused on skill building, culture change, and systems development to support others in fundraising.**
- ★ **The conversation about fundraising goals and progress belongs everywhere. It's not contained in a single department or confined to a single team.**



#3 FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS WITH DONORS BUILT ON STRONG, TRUSTING RELATIONSHIPS AMONG STAFF, BOARD, AND VOLUNTEERS

“If NCLR hired a small army of people who were very organized and less passionate, it wouldn’t come through in the same way. They hire people from our community, who reflect our community, who are really passionate about what they are doing. It’s palpable in your interactions with them.”

—Rachel Robasciotti, Donor, National Center for Lesbian Rights

The centrality of authentic relationships to successful fundraising came through in every Bright Spot interview we conducted. None of these organizations approaches relationships with donors as transactional or as only about money. As we interviewed their donors, we heard emotional words of connection to the Bright Spot organizations that go far beyond “investing in an important cause” or perceiving an organization to be “well-run.”



“Being around people from Jewish Voice for Peace makes me a better person.”

—Donor, Jewish Voice for Peace

“You see a lot of organizations that advertise and ask but I don’t see them fighting the fight. That’s what makes me support CHIRLA. They are supporting me, too. That is something that I can’t describe in words.”

—Donor, CHIRLA

“I am part of the village that makes this whole thing work—keeping the lake beautiful. A lot of people long to have connection to the environment, but this organization has been able to tap into something other organizations have not.”

—Donor, Mono Lake Committee

“Yes, my primary relationship now is as a donor. Will I ever actually see it that way or feel that way though? Probably not. I’m just like a lot of the other individual donors we have who have a kind of ownership and connectedness.”

—Donor and Former Board Member, NCLR

FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS

SPOTLIGHT: Melinda Wiggins, executive director at **Student Action with Farmworkers (SAF)**, thrives at fundraising because it draws on her relational strengths. She enjoys it so much that she has resisted pressure over the years to hire a development director. “We have felt pressured by other groups and sometimes from board members to hire a full-time development director and have that person hold all of this work. I’ve pushed back partially because I like doing fundraising myself and partially because it has to be more distributed and integrated into the work,” she says. At one of those pressure moments 10 years ago, Melinda advocated for hiring an associate director instead of a development director. “I love fundraising and I don’t like human resources and back office work, so the associate director made more sense for us. We have to do what’s right for the organization and play to people’s strengths.” Melinda is frequently out of the office meeting with SAF supporters. “Donor meetings are a pleasure,” she says. “Is this meeting personal or is it work?”



Student Action
with Farmworkers

I truly feel like I can have a personal relationship with a donor and a professional relationship with a donor. It’s all about relationships.”

One of Melinda’s many long-standing relationships is with donor, Seema Kakad Jain, who was a summer intern at SAF back in 2003. Now an attorney in Washington D.C., Seema recalls that Melinda assured her she would be in touch about being a donor once she left the program. Today, according to Seema, “SAF does a really good job helping donors feel connected. The mission has not changed and a lot of people working at SAF have not changed. That’s key. It’s a personal relationship plus the fact that they’re continuing the amazing work. It’s never just about the money.” Melinda and her staff use a variety of means to sustain the relationship with Seema and fellow alumni, including Facebook pages for each intern class and a recent alumni lunch for which Melinda traveled to D.C. And, Melinda sends personal e-mails to Seema fairly regularly. “She reminds me of my college self,” says Seema, “and the changes I went through personally during those years.” ★



FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS

SPOTLIGHT: According to **FIERCE**'s interim executive director, Angela Moreno, the relationship that young LGBTQGNC people of color and their allies have with FIERCE is so powerful that it generates donor support even from people outside of New York who don't directly experience the organization's work. "Money comes to us unsolicited sometimes based solely on the relationship people feel to our organization," she says. In New York, FIERCE is a vehicle for relationship-building. "People can come to an event or a drive and feel connected to each other even though they've never met before," says Angela. Their most well-known fundraiser is a Bowl-a-thon that is organized and led by young Queer, Trans, and Gender Nonconforming people of color, through which the community of FIERCE members, supporters, board, and staff raise money from their friends, coworkers, and family members. According to Angela, "The history and purpose of our organization is so clear and so deeply meaningful that it's really easy for donors to say yes to us."



Authentic relationships with donors over a long horizon—which leads to what's technically referred to as the "lifetime value of a donor"—are clearly paramount to a strong individual giving program. But what we observed among the Bright Spots, is that these strong donor relationships are built on the foundation of strong staff and board relationships with one another. You can't have one without the other.

Time and again in our interviews, the quality of relationships among staff and board was both palpable to us and lifted up by our interviewees as instrumental to their success in building a robust individual giving program. In many cases, the leaders have been working together for years and the trust and shared ethos around fundraising they have built is readily apparent. ★



FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS

SPOTLIGHT: The trusting relationship between **Breast Cancer Action (BCAction)** Executive Director Karuna Jaggar and board chair Dr. Tracy Weitz allowed them to take a leap of faith together and orchestrate a bold shift in how the BCAction board of directors engages in fundraising. “Our individual giving program was driven by our former executive director who maintained most of BCAction’s original relationships. Karuna had a very different vision of full board and staff engagement with individual donors,” remembers Tracy. At Karuna’s first in-person board meeting as executive director, she laid out her desire to establish a board give-and-get policy to her board members, each of whom had been told explicitly upon recruitment that they did not have to participate in fundraising. “It was mostly shock,” says Tracy. “Wow, there is no way we can raise that much money.” It was out of support for their new executive that the board agreed to discuss Tracy’s proposal. After an in-depth discussion, they set a give-and-get policy of \$10,000 per board member. “Maybe we lost some potential board members

**BREAST
CANCER
ACTION**
bcaction.org

who felt they couldn’t do it,” said Tracy, “but only in the first year. Now, our veteran board members can share their fundraising stories with prospective members and say, ‘I’ve been fine, and you’re going to be fine.’” It’s important to note that BCAction does not prioritize personal wealth now more than it did before this policy change, but rather invests the time to support board members’ success, regardless of personal financial capacity, in the fundraising program.

About Karuna, Tracy says, “A key input to our success is no drama. Fundraising is ongoing and has many ebbs and flows. Karuna has always maintained a level head and provided stability, which really helps with an individual donor program. I can’t stress enough how important that is.” And Karuna points to Tracy’s leadership as the board chair; Tracy’s trust and support of her as the new executive director; her willingness to, as she put it, “have the challenging conversations that got personal about how they view themselves as a team.” ★



In our conversations with the Bright Spots, the word “love” came up more often than one might expect in a study of fundraising success. Donors loving the organizations. Staff loving their donors. Leaders who have worked together a long time loving the work they do together. But then, perhaps this is not surprising given the original definition of philanthropy, which is “love of humankind.” These organizations work day in and day out on issues that are complex and often painful—homelessness, illness, racism, environmental degradation. Still, through their authentic relationships with one another, staff, board, volunteers and donors alike find joy and resilience.

BRIGHT SPOT ORGANIZATIONAL MINDSETS

The following mindsets about authentic relationships are prevalent across the 16 Bright Spots:

- ★ **“Donor” is one aspect of many to the relationships that committed supporters forge with an organization.**
- ★ **Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.**
- ★ **High trust and accountability among staff and board members allow leaders to weather fundraising’s inevitable ups and downs together.**





#4 FUNDRAISING IS CHARACTERIZED BY A SYSTEMATIC APPROACH TO DONOR ENGAGEMENT AND CONTINUOUS IMPROVEMENT

“We don’t have a singular development plan. We have a system.”

—Ari Wohlfeiler, Development Director, Jewish Voice for Peace

Across the wide range of staff sizes and budgets of these organizations, one deceptively simple practice stands out: whatever system for cultivating and engaging their donors they’ve chosen, the Bright Spots work it with discipline and a commitment to continuous improvement. This work is often championed and led by the development director, but understanding development practices and metrics extended beyond the individuals in those positions. Many Bright Spots also use their development committees as a place to make regular meaning of fundraising performance trends. Overall, a willingness to experiment and learn was pervasive, which also means that the team effort and the work involved is fun and interesting for everyone who is engaged in it.



For many of the Bright Spots, a critical aspect of building and refining an individual donor program is tending to the intersection of communications and fundraising, with an emphasis on communicating the truth rather than figuring out “spin.” Especially for groups working on issues that generate daily headlines such as immigration or transgender rights, development and communications are inextricably linked and staff driving these efforts work extremely collaboratively. Often the executive director, who serves as a key face of the issue externally, is also deeply involved in message development and testing. This all requires that the “development plan,” or “system” as JVP’s development director calls it, be at once disciplined and flexible. And again, getting it right requires strong, trusting, non-siloed relationships among the staff in these roles.



FUNDRAISING IS CHARACTERIZED BY A SYSTEMIC APPROACH

SPOTLIGHT: **National Center for Lesbian Rights (NCLR)** has been studying and improving its multi-million dollar fall major donor campaign for many years; some donors have been giving since 1977. Between September and December each year, NCLR raises \$2 million from major donors, 30 percent of which is managed through the organization's 30 staff, board and volunteer donor portfolio managers. Through a donor survey, NCLR learned that marriage equality was not the most important thing to their donor base; in fact, donors were highly motivated by the other legal work NCLR does. This means that Ace Portis, NCLR's major gifts officer, has to "keep an ear to the ground" and stay informed about the large catalog of cases underway. "I am in daily contact with our communications staff," she says. "We are looking for more systematic ways of learning what's going on with our cases because we want to plug donors into the work they are most interested in." NCLR now uses a project management application to track cases and campaigns together. Ace's passion for giving major donors



the information they want is infectious. "I have been knighted the donor-centric member of the team. It's my greatest joy and passion to connect a donor to the thing that is super in tune with what they want to build their philanthropy around."

As an organization that has relied on individual support from its inception, NCLR has established an ethos of continuous learning about all of its fundraising, which in addition to the major donor program includes a significant annual gala, smaller events, and direct mail. Response rates to appeals, cultivation, and invitations are all tracked and analyzed by a member of the development team and discussed on a regular basis. "We never tread water," says long-time Executive Director Kate Kendell. "At the end of every campaign we go over what worked, including all the feedback from donors. We make sure all of our records are accurate. The database is exactly right. We assess which solicitors needed more support. What messages did donors respond to most? We are constantly evaluating. Every year the broad parameters are the same, but the details that surround each core component constantly get tweaked." ★



FUNDRAISING IS CHARACTERIZED BY A SYSTEMIC APPROACH

SPOTLIGHT: **CASA de Maryland** leverages its strength in communications and volunteer engagement to cultivate donors. “We have a comprehensive way we engage volunteers,” says George Escobar, senior director of health and human services. “We bring them on to help us deliver services. Through volunteering, their relationship to CASA deepens. They get more involved with our members and community and it motivates them to donate.” Volunteer recruitment is enabled in large part by CASA de Maryland’s communications program. “We have a strong communications department and a strong footprint in social



media,” says George. “Anything that happens to a Latino in the area, we will get a media inquiry, in addition to media we pursue, both in Spanish and English-language press. We leverage that to reach out to volunteers. It takes lots of time to work well with volunteers, but in addition to their help and engagement, they are a pool of potential donors.” ★

SPOTLIGHT: Brielle Darynn is a board member at the **Transgender Law Center (TLC)**. Her day job is as a corporate consultant in data management for large companies. For TLC, this makes her an ideal member of the 13-member development committee that she co-chairs. According to Brielle, “The development committee is disciplined and rigorous in working with our data to come up with decent fundraising analytics. We help inform staff and board about where contributions have come from in previous years. On the committee, we want to get a good sense of trends, retention rates, and other program elements to work on



Transgender Law Center

Making Authentic Lives Possible

before we go forward with a strategy for how we’ll meet the budgeted revenue goals for the year.”

Data is also central to how TLC Development Director Nathan Harris partnered with Executive Director Kris Hayashi to enable Kris’s donor stewardship work. The two meet weekly, sometimes for as many as three hours at a time, to cover both fundraising strategy and immediate next actions. In these meetings, Nathan reviews the Salesforce database dashboard reports, gift reports, and stewardship reports. He also plans donor visits with Kris and debriefs them afterwards. This all supports Kris meeting personally with six to eight TLC donors per month. ★

FUNDRAISING IS CHARACTERIZED BY A SYSTEMIC APPROACH

SPOTLIGHT: The Mono Lake Committee (MLC) has focused consistently and rigorously on its central fundraising strategy: direct mail to its 16,000 members. This is in large part due to partnering with the same consultant, John Genette, for more than 20 years. “You can’t think out of the box unless you have a good strong box,” John says. “With direct mail, 20 percent of your box goes away every year and you have to keep acquiring people. In 2001, we learned the lesson that you can’t ever back away from donor acquisition. Even



after the recession, MLC has grown modestly but steadily. Net income has grown 100 percent over the last 20 years—5 percent per year—which outpaces inflation. It is slow and steady that wins the race.” According to John, MLC’s success comes from focusing each year on exactly how many new members it needs to acquire and determining how much that will cost rather than backing into a strategy by asking, “What’s our budget for donor acquisition next year?”

MLC Executive Director Geoff McQuilkin underscores the discipline necessary by saying, “A membership program is a permanent part of an organization. It’s hard work. You need staff. You need resources. You need to build that whole system and not treat it like an event or a grant proposal; it’s easy to launch this big thing and then not retain members over time. But when it’s serious, it works for us not just as a fundraising program but a core element of the way we work together as board, staff, volunteers, and members.” ★



None of the Bright Spot organizations is perfectly satisfied with its development systems. In particular, a number of the groups aspire to a more sophisticated strategy for moving current donors up to higher levels of giving. But the year-round attention to their programs is ubiquitous among them, as is the continuous effort to gather and use donor data better. Another important discipline across the Bright Spots: executive directors are not exempt from the system; they model playing their assigned roles and, as Kate Kendell of NLCR said, “staying in their lanes” so that other staff and volunteers can thrive in theirs. Overall, a willingness to experiment and learn is pervasive, which also means that the team effort and the work involved is fun and interesting for everyone who is engaged in it.

BRIGHT SPOT ORGANIZATIONAL MINDSETS

The following mindsets about fundraising discipline are prevalent across the 16 Bright Spots:

- ★ **More important than having a perfect system is working whatever system you have with a stance of rigor and continuous improvement.**
- ★ **Development and communications are inextricably linked; compelling communications are a powerful way to acquire, engage, and retain donors.**
- ★ **The use of data is not just about having a donor database. It’s also about surveying your donors; getting feedback from your fundraisers on what messages are resonating; and studying the performance of every fundraising campaign and event.**



CONCLUSION

“Mission-driven fundraising is tough and it isn’t necessarily driven by the goal to raise the most money. It’s driven by the goal to change the world. We’re reaching many supporters of our issues in our organizations, and we need to make them financial supporters, as well.”

—Beth Rayfield, Development Director, CHIRLA

As distinct as these organizations are from one another, they have something in common that isn’t terribly prevalent among their peers: an approach to fundraising that is highly integrated and mission-driven. Sometimes, it flies in the face of conventional wisdom; they’re told they should hire professional fundraisers, for instance, or move away from less cost-effective methods like community events. Most do not have fancy materials or snazzy websites. They also face similar challenges. We heard from the Bright Spot leaders who want to grow their organizations that they are grappling with how to scale this organizational highly relational approach to fundraising. And many of them acknowledge how dependent their success is on long-time leaders, despite their distributed approach to fundraising. As Bob Fulkerson of PLAN puts it, “Fundraising and organizing are about relationships, so the longer you have to build relationships the better you’re going to be at it. That’s the thing about longevity.” Many of the Bright Spots will soon have to adapt to very long-time leaders moving on.

We learn from these Bright Spot organizations that for individual fundraising to be a meaningful and consistent part of your budget, it has to be a meaningful and consistent part of your organization. We learn that authentic relationships have to be matched with very hard work. We also, perhaps surprisingly, learn that many people—not only the development director, the executive director, and the board—can be successful in fundraising if they have the proper training and support from an organization. And above all, we learn that this hard work pays dividends far beyond dollars raised; it can actually be an integral part of the work of social change.

BRIGHT SPOT ORGANIZATIONAL MINDSETS

To recap, these are the mindsets that undergird the fundraising success of the 16 Bright Spots:

- ★ **The decision to raise money from individuals—as well as the approaches used to do so—are steeped in existing organizational values and philosophy.**
- ★ **Being genuine about who you are and what you stand for as an organization is core to fundraising success.**
- ★ **Fundraising is a form of organizing and power-building, not merely a strategy for financing the organization’s work.**
- ★ **Fundraising is not the purview of a select group of professionals, but a process, if well-supported, that anyone can engage in.**
- ★ **Development directors are organizational leaders focused on skills building, culture change, and systems development to support others in fundraising.**
- ★ **The conversation about fundraising goals and progress belongs everywhere. It’s not contained in a single department or to a single team.**
- ★ **“Donor” is one aspect of many to the relationships that committed supporters forge with an organization.**
- ★ **Authentic relationships with donors are part of a larger organizational culture that values relational rather transactional interactions with everyone.**
- ★ **High trust and accountability among staff and board members allow leaders to weather fundraising’s inevitable ups and downs together.**
- ★ **More important than having a perfect system is working whatever system you have with a stance of rigor and continuous improvement.**
- ★ **Development and communications are inextricably linked; compelling communications are a powerful way to acquire, engage, and retain donors.**
- ★ **The use of data is not just about having a donor 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.**

BRIGHT SPOT ORGANIZATIONS

At The Crossroads

At The Crossroads reaches out to homeless youth and young adults at their point of need, and works with them to build healthy and fulfilling lives. We focus on young people who do not access traditional services and are disconnected from any type of consistent support, who would not get help without us. We help our clients with anything and everything they need, providing unconditional support for as long as they want to empower them to build outstanding lives, not just lives of subsistence. atthecrossroads.org

BRIGHT FACT: ATC's support from individuals has grown each of the last three years, from \$397,000 in 2013 to \$554,000 in 2015.

Breast Cancer Action

Breast Cancer Action (BCAction) is a national education and activist non-profit whose mission is to achieve health justice for all women at risk of and living with breast cancer. BCAction focuses on systemic interventions that address the root causes of the disease and produce broad public health benefits. As the watchdog for the breast cancer movement, we educate, organize and take action for systemic change in three priority issue areas: 1) Breast Cancer Screening, Diagnosis & Treatment, 2) Root Causes of Breast Cancer and 3) Pink Ribbon Marketing and Culture. www.bcaction.org

BRIGHT FACT: With high engagement from its board of directors, Breast Cancer Action raised 75% of their annual budget, over \$660,000, from individuals in 2015.

CASA de Maryland

CASA is the foremost Latino and immigrant organization in the mid-Atlantic region and a national leader in supporting immigrant families and ensuring that all individuals have the core supports necessary for full participation in society. Its mission is to create a more just society by building power and improving the quality of life in low-income immigrant communities, and its vision is for a future in which diverse and thriving communities live free from discrimination and fear, and work together with mutual respect to achieve full human rights for all. Over its 30-year history, CASA has won the deep trust of the region's immigrant community, and established itself as a strong national leader in innovations for immigrant-focused services, as well as a backbone organization for collective impact involving community-based, government and private partners. wearecasa.org

BRIGHT FACT: CASA de Maryland has more than 65,000 dues-paying members, many low-income immigrants. In 2015, they raised a combined \$794,000 from members and individual donors.

The Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA)

The Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA) was founded in 1986. CHIRLA is a California leader with national impact made of diverse immigrant families and individuals who act as agents of social change to achieve a world with freedom of mobility, full human rights, and true participatory democracy. CHIRLA's mission is to achieve a just society fully inclusive of immigrants. CHIRLA organizes and serves individuals, institutions and coalitions to build power, transform public opinion, and change policies to achieve full human, civil and labor rights. For 30 years, CHIRLA's innovative programming in community education, community organizing, civic engagement, policy/advocacy, legal services and leadership development for youth has served the immigrant communities of the Los Angeles region, reaching over 100,000 people in 2015. Our principle of direct leadership and participation from immigrant communities has resulted in meaningful advocacy for economic justice, policy victories for immigrant workers, and a mobilized constituency prepared to advocate on its own behalf. www.chirla.org

BRIGHT FACT: Even as it executed a statewide expansion of its services to meet the demand for immigrant legal and support services in 2014-15, CHIRLA's support from individuals grew 40% to \$254,000.

FIERCE

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. We develop politically conscious leaders who are invested in improving ourselves and our communities through youth-led campaigns, leadership development programs, and cultural expression through arts and media. FIERCE is dedicated to cultivating the next generation of social justice movement leaders who are dedicated to ending all forms of oppression. www.fiercenyc.org

BRIGHT FACT: As a youth-led organization with just 3 paid staff, FIERCE members and allies raised more than \$75,000 from individuals in 2014.

Jewish Voice for Peace

JVP seeks a just solution for Palestinian refugees based on principles established in international law; an end to violence against civilians; and peace and justice for all peoples of the Middle East. jewishvoiceforpeace.org

BRIGHT FACT: In 2015, JVP raised 94% of its annual budget from individual donors through a highly distributed approach to fundraising.

Kentuckians For The Commonwealth

Kentuckians For The Commonwealth is a community of people, inspired by a vision, building New Power and a better future for all of us. Together, we organize for a fair economy, a healthy environment, new, safe energy, and an honest democracy. www.kftc.org

BRIGHT FACT: Over the last three years, KFTC has raised over \$1.4 million dollars of individual support, averaging 23% of their revenue annually.

Mono Lake Committee

Mono Lake Committee is dedicated to protecting and restoring the Mono Basin ecosystem, educating the public about Mono Lake and the impacts on the environment of excessive water use, and promoting cooperative solutions that protect Mono Lake and meet real water needs without transferring environmental problems to other areas. www.monolake.org/mlc

BRIGHT FACT: Using print and email campaigns as their primary strategy, Mono Lake Committee raised more than \$3.5 million of individual support in 2014, accounting for 90% of their annual revenue.

Mujeres Unidas y Activas (MUA)

Mujeres Unidas y Activas (MUA) is a 26 year old grassroots organization of Latina immigrant women with a double mission of promoting personal transformation and building community power for social and economic justice. MUA empowers and educates our members to provide mutual support, offers trainings to build economic security and leadership, and is at the forefront of coalitions for immigrant and workers' rights on the local, regional, national, and international levels. MUA is a founding member of the National Domestic Worker Alliance, helped lead efforts to pass the historic 2013 California Domestic Worker Bill of Rights, and is currently gearing up for another statewide campaign to win further protections for domestic workers. mujeresunidas.net

BRIGHT FACT: With a shared leadership model, including co-executive directors and a grassroots fundraising coordinator on staff, MUA engaged many staff and volunteers in raising \$517,000 from individuals in 2015.

National Center for Lesbian Rights (NCLR)

NCLR is a national legal organization committed to advancing the civil and human rights of lesbian, gay, bisexual, and transgender people and their families through litigation, legislation, policy, and public education. www.nclrights.org

BRIGHT FACT: Through a tightly coordinated major donor campaign and an annual gala, among other tactics, NCLR raised \$3.5 million from individuals in 2015.

Student Action with Farmworkers

Student Action with Farmworkers (SAF) brings 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. Through leadership development of young people, policy advocacy, and popular education and organizing, we have engaged thousands of students in the farmworker movement, while focusing on Latinos from farmworker families. Each year, SAF works deeply with 50 youth and college students who conduct outreach and stand in solidarity with over 5,000 field and food processing workers in the South. www.saf-unite.org

BRIGHT FACT: Using personalized online campaigns by staff and youth participants as a key strategy, SAF's support from individuals went up each of the last three years; in 2015 it was \$122,000.

Transgender Law Center

Transgender Law Center changes law, policy, and attitudes so that all people can live safely, authentically, and free from discrimination regardless of their gender identity or expression. We envision a future where gender self-determination and authentic expression are seen as basic rights and matters of common human dignity. transgenderlawcenter.org

BRIGHT FACT: Between 2013 and 2015, Transgender Law Center grew its support from individuals by a remarkable 228% to \$646,063.

We also did a cluster interview with the executive directors only (not staff, board, and donors) of 4 statewide advocacy groups working on a mix of social justice issues in relatively small population states.

Iowa Citizens for Community Improvement

Iowa Citizens for Community Improvement is a 40-year old, speak-truth-to-power community organizing group that mobilizes and engages thousands of everyday people to put people before profits, politics and polluters. Our power comes from thousands of members from all walks of life – urban and rural, black and white, immigrant and lifelong Iowans. iowacci.org

BRIGHT FACT: Iowa Citizens for Community Improvement raised \$386,000 (32% of its revenue) from individuals in 2014.

Nebraska Appleseed

Nebraska Appleseed is a nonprofit legal advocacy organization that fights for a more just society. We take a systemic approach to complex issues such as poverty, immigration, affordable health care, and children's welfare. And we take our work wherever we believe we can do the most good through legal advocacy in court, legislative advocacy at the Capitol, or organizing community members to make their voices heard. neappleseed.org

BRIGHT FACT: Nebraska Appleseed raised \$476,000 (22% of its revenue) from individuals in 2015.

Northern Plains Resource Council

Formed by Montana ranchers, Northern Plains is a conservation group with deep roots in family farming and ranching. We fill a unique niche in that, as an environmental group, we bring non-traditional voices into conservation issues. Our work is built on a foundation of community organizing to raise public understanding of the issues and of the need to be part of the solution. www.northernplains.org

BRIGHT FACT: Northern Plains Resource Council raised \$409,000 (36% of its revenue) from individuals in 2015.

Progressive Leadership Alliance of Nevada (PLAN)

PLAN is a statewide multi-issue coalition formed in 1994 to deepen democracy and achieve greater justice in Nevada. In order to build an economy that puts people and planet first, PLAN organizes around the triple crisis facing our country and world: Economic inequality (especially along gender lines), structural racism, and climate change. www.planevada.org

BRIGHT FACT: PLAN raised \$83,952 (8% of its revenue) from individuals in 2015.

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