



CompassPoint

WWW.COMPASSPOINT.ORG

FUNDRAISING BRIGHT SPOTS *IN ACTION*

REFLECTIONS, INSIGHTS,
AND SHIFTS IN APPROACH
FROM COMPASSPOINT'S
FIRST FUNDRAISING
BRIGHT SPOTS COHORT



WHAT ARE FUNDRAISING BRIGHT SPOTS?

In 2016—as a joint project with the HAAS, Jr. Fund and Klein & Roth Consulting—CompassPoint published *Fundraising Bright Spots: Strategies and Inspiration from Social Change Organizations Raising Money From Individual Donors* (www.compasspoint.org/brightspots), authored by Jeanne Bell and Kim Klein.

The report lifted up real-life stories of organizations that have experienced inspiring success in individual donor fundraising and highlighted potential solutions for moving past widespread fundraising challenges.

While each of the organizations featured in the report approached fundraising in its own unique way, we also observed some common patterns in how they were creating success:

BRIGHT SPOTS THEMES

- ▶ FUNDRAISING IS CORE TO THE ORGANIZATION'S IDENTITY
- ▶ FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS WITH DONORS
- ▶ FUNDRAISING IS DISTRIBUTED BROADLY ACROSS STAFF, BOARD, & VOLUNTEERS BUILT ON STRONG, TRUSTING RELATIONSHIPS AMONG STAFF, BOARD, & VOLUNTEERS
- ▶ FUNDRAISING IS CHARACTERIZED BY A SYSTEMATIC APPROACH TO DONOR ENGAGEMENT & CONTINUOUS IMPROVEMENT

PUTTING BRIGHT SPOTS LEARNING INTO ACTION

From September 2016 to April 2017, CompassPoint convened twelve organizations (each one with a participating team of two) to dive deep into the four core Bright Spots themes, learn together and from each other, and create actionable plans for a values-driven fundraising approach.

In these next few pages, we share some of the lightbulb moments and shifts in approach that members of this first cohort experienced.

We hope they'll inspire you to reflect on your own approach to fundraising!

▶ THE COMPASSPOINT TEAM

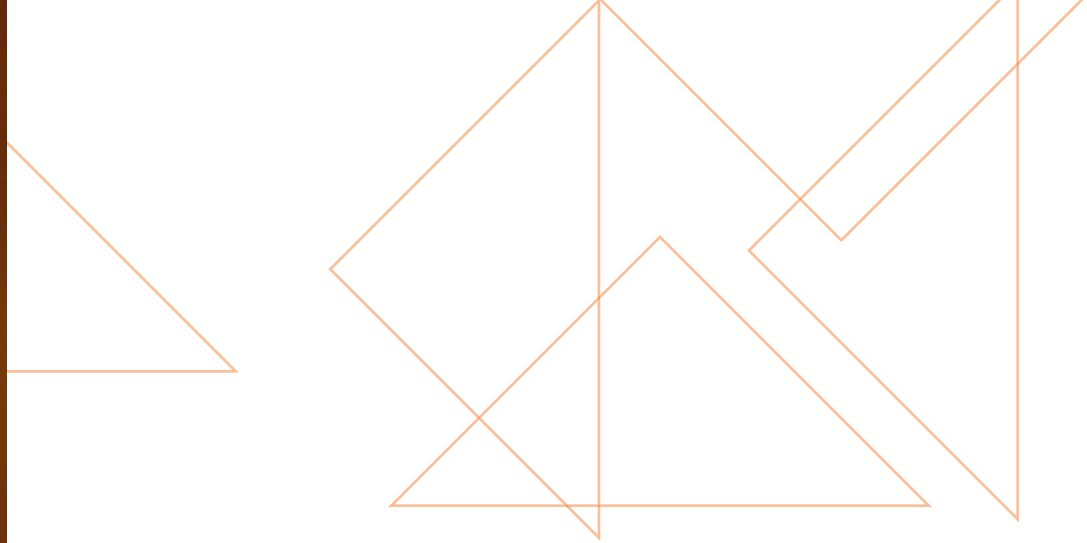
Learn more about *The Fundraising Bright Spots Program: Making Fundraising Work for You* training program at www.compasspoint.org/fundraising-bright-spots-program

FUNDRAISING BRIGHT SPOTS COHORT 1

- ▶ Bike East Bay
- ▶ Buddhist Peace Fellowship
- ▶ California School-Age Consortium
- ▶ Central California Family Crisis Center, Inc.
- ▶ Ella Baker Center for Human Rights
- ▶ Housing Rights Committee of San Francisco
- ▶ Human Options, Inc.
- ▶ Peninsula Conflict Resolution Center
- ▶ Queer Women of Color Media Arts Project
- ▶ RISE San Luis Obispo County
- ▶ SAVE (Safe Alternatives to Violent Environments)
- ▶ Women's Community Clinic

“ We applied the Fundraising Bright Spots concepts right away. We asked a current major donor to reach out to another donor for a specific project and that approach secured the largest single individual gift we have ever received.

QUEER WOMEN OF COLOR MEDIA ARTS PROJECT



“ I love building connections between people and causes.

The revolution must be funded! There is a myth out there about the divide between people who do social justice work and people who do fundraising, but these are not at all mutually exclusive. Fundraising is mission-driven work and is at the core of building and sustaining social justice movements.

**TARA MEDVE, DEVELOPMENT & COMMUNICATIONS
DIRECTOR FOR WOMEN'S COMMUNITY CLINIC**

BRIGHT SPOTS THEME

FUNDRAISING IS CORE TO THE ORGANIZATION'S IDENTITY

WHAT'S SHIFTING?



We developed what we now call **fundraising the RISE way: Respect, Inspire, Support, Empower**. Our board really knows our mission, so we are using RISE as a way to engage them in the culture of philanthropy.

- RISE



Our organization was really ripe for Fundraising Bright Spots, especially the idea of **'culture of philanthropy.'** We want to instill the value of fundraising not only across our organization but also to those we serve. We see an opportunity to empower young adults to engage in and support the things that are most important to them.

- CALSAC



Leaders and sharing power is the core of what we do. So this is about **developing leadership that plays into fundraising.**

- QUEER WOMEN OF COLOR MEDIA ARTS PROJECT

SPOTLIGHT ON | Queer Women of Color Media Arts Project

[www.qwocmap.org]

What ideas from the program did you use to rethink your approach to fundraising?

We used everything to rethink everything about fundraising and philanthropy and how our organization is structured. What made the biggest difference for us was the idea of distributing fundraising responsibilities across the organization, and transforming the role of our development staff into that of a coordinator.

Leadership development is in the DNA of our programs and work, and we had informal paths for people to join our fundraising efforts. After Bright Spots, we not only have a manual, we also have a plan to increase participation from our community. This eliminates a lot of pressure on individual staff and made fundraising more like a dance team or team sport (things that our staff has a lot of experience with), and makes it more fun!

We've experimented with this during 2017 Give OUT Day. We asked people who had previously told us that they were afraid of fundraising to join us in promoting our campaign. Our approach was all about doing this as a group of people; as a big team. Even the scared newbies said that it was fun and exciting! In previous years, it felt like we were pulling teeth, and it was a stressful 24 hours for the one staff member in charge of the giving day. This year, not only did our volunteer fundraisers have a great time, our community donated more than they ever have, which surprised and amazed us.

What did you change?

We changed our thinking about philanthropy and fundraising and the structure of our organization. Mapping out our organization and community let us know that there were more bright spots than we had realized; that we had more supporters than we realized, which was really heartening. It allowed us to think strategically about our resources, and where we should direct our energy, what things (programs, activities, ideas, etc.) needed, a "yes", a "no," a "maybe," or a "later." For a small organization that has to combine functions and resources to be effective, that was a big shift, efficiently pouring resources into areas that will make us more successful. Or like combining the light of many candles in one place, or one seed in a garden, it just returned abundance to us.

What was the outcome?

Happier staff members, with better working relationships with our board, because we are focused and see our results. More engaged community because we communicate often and involve them more in our work. A clearer sense of resources so that we can be strategic and badass/bold about using film and creating social justice. A heightened sense of mission, why our work is so crucial, and how fundraising makes that work possible. Oh, and more income so that we can get it all done.

SPOTLIGHT ON | Women's Community Clinic

[www.womenscommunityclinic.org]

What ideas from the program did you use to rethink your approach to fundraising and what was the outcome?

We applied our learning from Bright Spots to achieve 70% staff participation in our most recent fundraising campaign in March 2017, which raised \$187,000 in three weeks from 1,100 donors. It was our most successful org-wide fundraising campaign to date.

Here's an excerpted message I got from one of our Program Directors:

"It's truly amazing to see what's possible when you just ask. I went into this campaign with a bit of fear and it's actually been so fun and provided grounding amidst so much change. Thank you!"

How did you get there?

The shift was a combination of many things—the right timing, the right message, and already having built some foundation of fundraising culture before we asked folks to go “all in”. The biggest shift for us as leaders was to involve more people as our “bright spots” and to increase transparency about fundraising org-wide.

What's Next?

We need to continue to cultivate this culture or it will be lost—it takes work to maintain it!



“ I really love telling people about our work.

I love that creating a fundraising plan is a time to sit down together as a staff and ask, ‘What did we really do this year? What have we done for our community at large?’ It’s a chance to say, ‘Wow, here’s a bunch of stuff we did that’s really great. Now, where do we want to go from here?’

**GINGER JUI, COMMUNICATIONS DIRECTOR
FOR BIKE EAST BAY**



Photo Credit: Greg Clarke

BRIGHT SPOTS THEME

FUNDRAISING SUCCEEDS BECAUSE OF AUTHENTIC RELATIONSHIPS WITH DONORS

BUILT ON STRONG, TRUSTING RELATIONSHIPS AMONG STAFF, BOARD, & VOLUNTEERS

WHAT'S SHIFTING?

“ We focused on deepening connections. We needed to change the hearts and minds of staff. This means staying kind to each other as much as we do with our clients. And the community needed to see us and the people we serve. We modeled by showing up at community events, which showed, **'We are ALL the face of SAVE.'**

- **SAVE (SAFE ALTERNATIVES TO VIOLENT ENVIRONMENTS)**

“ During this program, we both got title bumps—from Coordinators to Managers. **Our executive director was really supportive of us and empowered us to make decisions.** The title change gave us more leverage with our board.

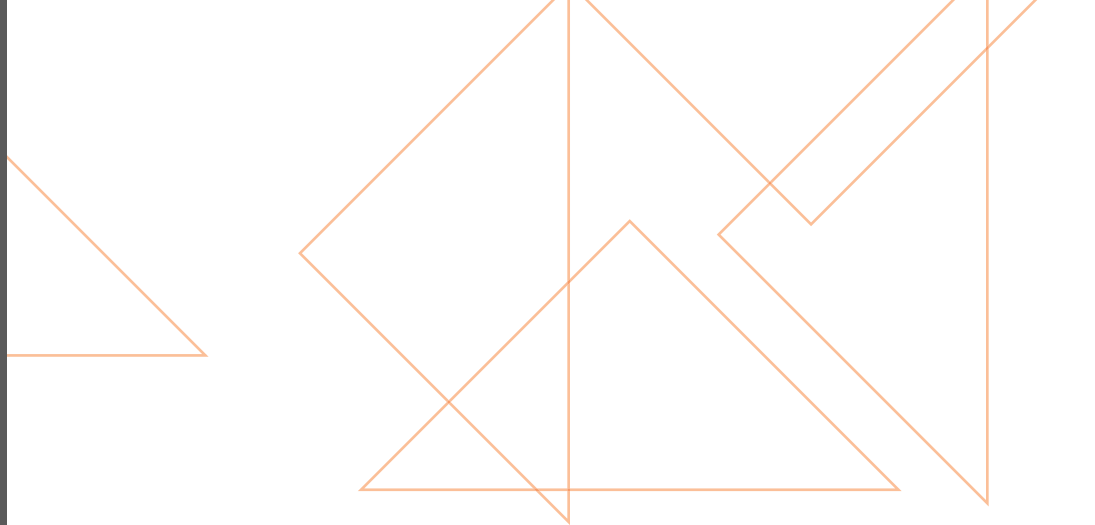
- **RISE**

“ Our Development and Communications Director is reinvigorated. She feels supported and seen. **People are stepping up with their own ideas and excitement.** It's been a pretty fundamental shift in a short period of time.

- **WOMEN'S COMMUNITY CLINIC**

“ Donors are their own Bright Spots. What kind of relationship do we want with donors? **It's about love.**

- **QUEER WOMEN OF COLOR MEDIA ARTS PROJECT**



“ I’m a wooer—it’s one of my strengths.

I love engaging with people. I love being one-on-one with people and talking about an organization that I believe in wholeheartedly. When I see potential funders or donors and their eyes light up because something I said really connected to their personal experience and I’m able to make that connection, that’s the best.

**MICHELLE VILCHEZ,
EXECUTIVE DIRECTOR
FOR PENINSULA CONFLICT RESOLUTION CENTER**

BRIGHT SPOTS THEME

FUNDRAISING IS DISTRIBUTED BROADLY ACROSS STAFF, BOARD, & VOLUNTEERS

WHAT'S SHIFTING?

“ The program helped solidify that **distributed fundraising is the way we want to do this**. We will not hire a Development Director. We were inspired by how Ella Baker Center brought volunteers into the process and are doing that now, too.
- BIKE EAST BAY

“ Coming into the program, we were kind of stuck. We were siloed and isolated. There wasn't a team doing the work to have a successful program. It really checked us. It reminded us **how important it is to engage others**.
- WOMENS COMMUNITY CLINIC

“ I needed to get over my pride and ego that **fundraising skills aren't just for a small part of the organization**. Now, when the time comes that I leave, the infrastructure will be in place.
- ELLA BAKER CENTER

“ As our fundraising committee grows, we are having the conversation about its composition with respect to **race, class, and allyship**. The most affected by incarceration [are not necessarily engaged in fundraising.] We have important questions to keep grappling with in terms of who should be doing what work.
- ELLA BAKER CENTER

SPOTLIGHT ON | Buddhist Peace Fellowship

[www.buddhistpeacefellowship.org]

What ideas from the program did you use to rethink your approach to fundraising?

Of the many ways in which the Bright Spots program helped us, one was by prompting us to reimagine how to balance our revenue streams while staying true to our values, mission, and audience. For us, balancing revenue streams included ramping up earned income, since over 90% of our funding came from individual donors.

What did you change?

A few months after the U.S. Presidential election, we offered our very first webinar series, called “U Mad? Wisdom for Rageful Times.” The six-week webinar featured interviews with seven esteemed Buddhist teachers—mostly queer-identifying and almost all people of color. In order to stay true to our economic values, we made the cost sliding-scale, with three main price points plus scholarships available all the way to 100%.

What was the outcome?

We hoped to enroll 100–150 participants and raise about \$4,000. Instead, over 600 people enrolled (!!!), and revenue soared above \$18,000. Drawing on wisdom to address rage, with an unapologetically anti-oppression framework, had touched into something near to people’s hearts. And offering a sliding-scale, pay-what-you-can model helped us more closely reflect our values as a social justice organization.

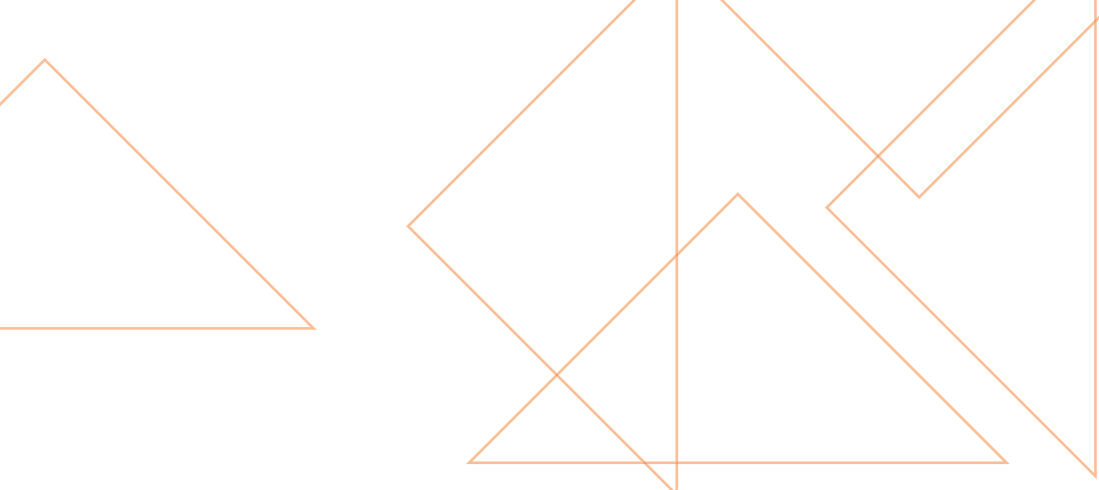
As the revolutionary Grace Lee Boggs put it: “Every victory creates new contradictions.” We continue to grapple with deeper questions around what it means to commodify and put a price on spiritual wisdom—even a sliding-scale price. We try to stay humble, experimental, and genuinely open to feedback. Ultimately we hope to gauge fundraising success by the quality of relationships, and the lessening of suffering.

SPOTLIGHT ON | California School-Age Consortium

[www.caslac.org]

SUCSESSES: A Culture of Philanthropy in Action (Timeline by CalSac) [Read More Here]

- 2013** Organizational effectiveness funding from The David and Lucile Packard Foundation supports the development of the CalSAC Board of Directors, a fundraising audit begins.
- 9/2014** CalSAC Board of Directors adopts an individual giving strategy for the organization and meets their first 100% board giving goal.
- 7/2015** Launches the first individual giving campaign in the 35 year history of the organization.
- 9/2015** Invests in fundraising by hiring a Development Director, the first in over 5 years.
- 12/2015** Raises over \$50K in 2015 including a \$25K matching grant from the S.H. Cowell Foundation.
- 1/2016** Board members develop personal fundraising plans, increasing their give/get contribution by 67% over the prior year.
- 9/2016** Selected for the CompassPoint Bright Spots fellowship, inspired by the Fundraising Bright Spots report developed by the Evelyn & Walter Haas Jr. Fund.
- 11/2016** All staff members are trained and empowered to fundrais for the organization by inviting constituents, friends and family to give. Staff voluntarily initiates 100% staff giving.
- 12/2016** Raises over \$75K in 2016 including a \$25K matching grant from The David and Lucile Packard Foundation.
- 3/2017** Foundation, doubling the amount raised in individual donations over the prior year and growing donors by 63%.
- 4/2017** Distributed fundraising model expanded to include director-level program staff as leads for fundraising projects and campaigns.
- 4/2017** Launches Giving Ambassador Program with 14 volunteers, community members, donors and constituents to fundraise.
- 5/2017** 222% increase in recurring donations in 2017 through a recurring donor campaign.
- 5/2017** Raises over \$18K in a day of giving campaign organized by the East Bay Community Foundation (EBCF). Featured as a success story for EBCF's "Mission Monday" series.



“ I really enjoy telling people about our successes and the work we’ve been doing.

Sometimes you get so caught up in work that you don’t have a moment to say, ‘Here are the things we’ve won’ or ‘Here are the reasons we should be proud of our work.’ In creating a fundraising plan, we have to have that conversation with all our staff—to talk about what we love about working here and doing this work.

**FRED SHERBURN ZIMMER,
ORGANIZER FOR HOUSING RIGHTS COMMITTEE**



BRIGHT SPOTS THEME

FUNDRAISING IS CHARACTERIZED BY A SYSTEMATIC APPROACH TO DONOR ENGAGEMENT & CONTINUOUS IMPROVEMENT

WHAT'S SHIFTING?

“ We used to say yes to everything—lots of events and staff-heavy fundraising activities that didn't have ROI. And, we weren't even talking about goals or strategy. We didn't have direction. We have had leadership changes at the staff and board level and now we have a board-staff partnership to help find the meaningful work. **We will be bringing the Fundraising Bright Spots training to our whole staff and board.**

- HUMAN OPTIONS

“ The program was **a good kick in the pants to solve our database problem**, which has been around a long time because it's deep and systemic. It's still hard, but it is cool that we're making progress.

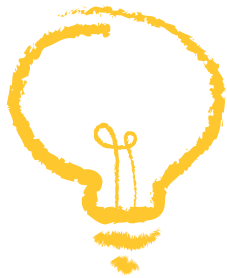
- BIKE EAST BAY

“ Over the last year we surveyed our donors for the first time to **improve our data** on them and assess their level of commitment. We also exceeded our individual giving goal: over 50% growth in the total money raised, and 60% growth in the number of donors.

- CALSAC

“ Our year-end appeal had personal names on each letter for the first time; we used a print and mail house. We also had a donor appreciation luncheon. Going forward, **our focus is on evaluating our campaigns and segmenting our donors.**

- RISE



“ The biggest light-bulb moments for me have illuminated the possibility of treating fundraising as an expression of our values.

It’s about who we want to be as people, and who we want to be as an organization. In the Trump era, I think it’s going to be even easier to see why it’s essential to boldly and materially stand by our values, act with integrity, support the most vulnerable among us, and invest in our long-term ability to navigate chaos with love and wisdom. Money will flow from this place of understanding (to borrow from the late, great revolutionary Grace Lee Boggs) ‘what time it is on the clock of the world.’

KATIE LONCKE, DIRECTOR OF ACTION AND MEDIA FOR BUDDHIST PEACE FELLOWSHIP

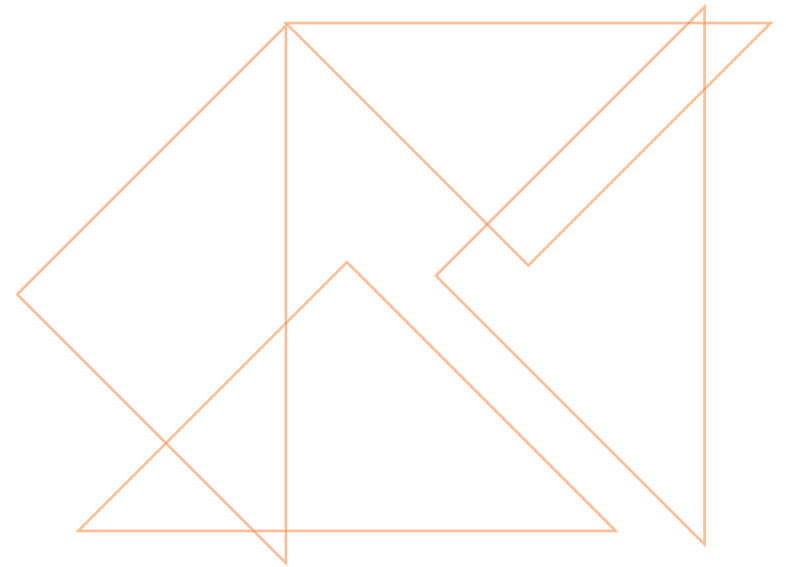
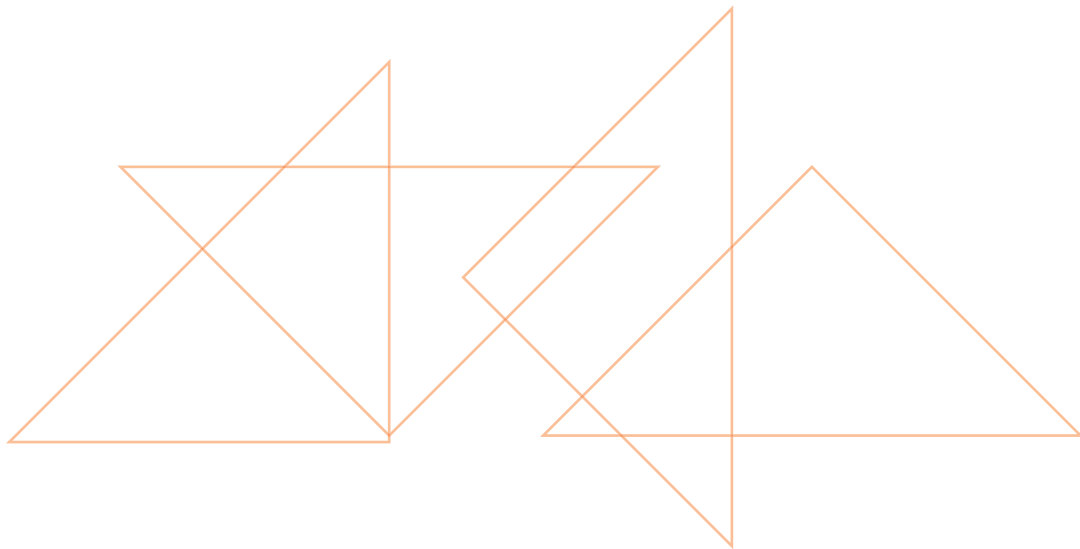




With thanks to the **HAAS, JR. Fund** for their investment and continued partnership in Fundraising Bright Spots research and application.

For more information on Fundraising Bright Spots, visit:

www.compasspoint.org/brightspots
www.haasjr.org/resources/fundraising-bright-spots



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