

## United Way of Greater St. Louis STRATEGIC TRANSITION PLANNING SERIES 2018-2019

4.12.19



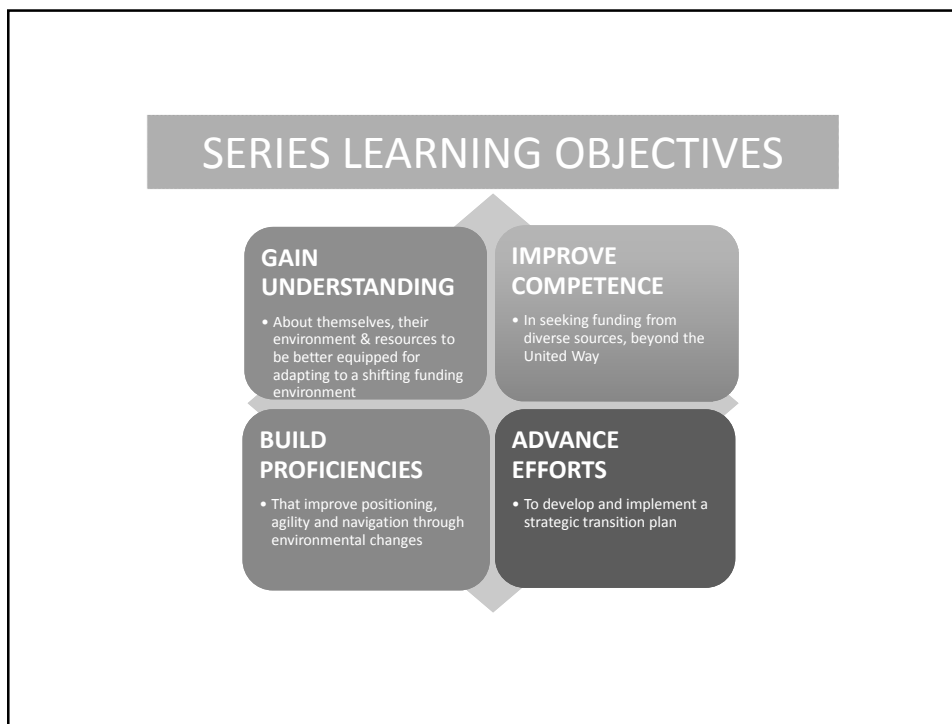
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## TRANSITION SERIES GOAL



Help member agencies gain competence in: navigating through environmental changes, better securing diverse & sustainable funding streams, and exploring/pursuing options, all of which enhance the fulfillment of community needs-based missions

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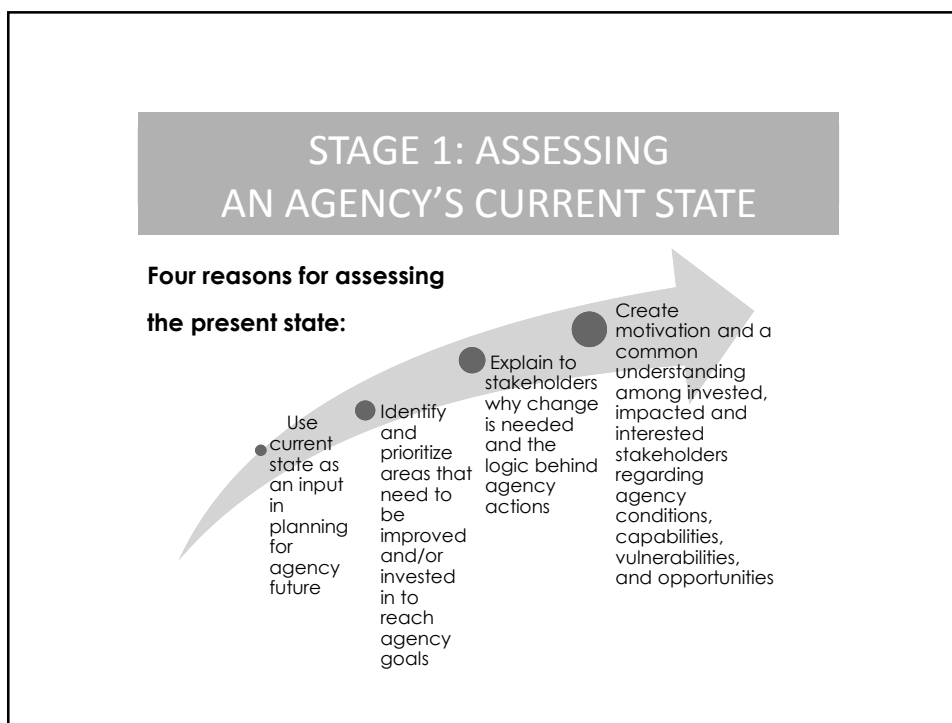
## RACIAL EQUITY LENS CONTEXT

- Different communities (and individuals within communities) situated differently relative to each other
- Differences due to many factors, including history, education, language, access to community assets...
- While intent of policies & programs is to create access for all people (lifting all boats), in practice, universal policies create access to opportunity differently
- A rising tide brings less benefit or possibly hazard if one's boat is leaky or if one does not have a boat.
- Series sessions will provide an opportunity to apply a racial equity lens to topics in hopes of getting all members in our community a boat that floats so that all boats can be lifted.

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Member Agency Strategic Transition Planning Series				
Stages progressively build toward culmination of helping agencies formulate a viable plan for better positioning in the current changing funding environment				
Stages:	Assessing an Agency's Current Position	Creating Vision & Setting Strategic Direction	Exploring Resources	Operationalizing the Plan
<b>Intent:</b>	Identifies/refines critical factors that outline agency overall environmental standing, affects current success & future viability. Informs decision-making in subsequent stages	Builds understanding and approaches to change management and consider possibilities, aligned with agency position, to shape future vision & strategic direction	Uncovers resources to be utilized to leverage agency's position amidst change and augment its ability to plan for reaching vision	Aligns vision, priorities & agency position with resources to develop a strategic workplan, outlining actions helping agency better adapt to changing landscape
<b>Sessions:</b>	#1. Series Overview & SWOT #2. Financial Health #3. Fund Devp Tools/Techniques #4. Prgm Financial Sustainability #5. Contingency Planning	#6. Change Management #7. Innovation #8. Vision/Strategic Direction	#9. Board Engagement & Role in Fund Devp #10. Dive into Fund Development #11. Strategic Alliances - P1 #12. Strategic Alliances - P2	#13. Creating an Actionable Transition Plan
<b>Learning Objectives:</b>	Participants will improve understanding about agency condition, including capabilities & vulnerabilities overall and in finance & fund development areas	Participants will shape their agency's future vision, leveraging position, in context of change, utilizing innovation, all to pursue improved mission fulfillment	Participants will identify resources (focusing on revenue generation & program/operational effectiveness) to help further mission fulfillment	Participants will utilize understanding & insight gained to frame strategic transition plan, better positioning agencies in the shifting environment
<b>Correlating Quality Standards:</b>	G: Board drives direction P: Effective program design G: Board financial oversight F: Financial stability F: Financial planning/oversight	G: Board drives direction G: Program effectiveness P: Program positive impact G: Community accountability A: Structure facilitates operations	G: Board meets strategic needs F: Financial stability F: Effective financial planning G: Board accountable to community	G: Board drives direction F: Financial stability P: Program positive impact G: Board accountable to community

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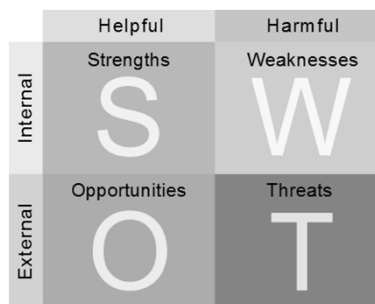
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## SESSION 1: SWOT Analysis

5.17.18

Presented by: Rebecca Bennett  
Emerging Wisdom

- Grounds plan
- Provides realistic view of agency's capabilities and vulnerabilities
- Identifies internal strengths and weaknesses
- Examines external opportunities and threats



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## SESSION 2: Financial Health

6.14.18

Presenters: Judy Murphy & Amy Altholz  
RubinBrown

Common financial sustainability benchmarks include:

- Operating reserves
- Liquidity evaluation
  - Days of Cash on Hand to Pay Expenses
  - Current Liquid Assets/Current Liabilities
- Funding gap analysis
- Diversified funding streams
- Budget vs. actual analysis



 RubinBrown

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SESSION 3: Fund Development Tools & Techniques7.12.18

Presented by: Wendy Dyer, Wendy Dyer Fund Development Consultants

Where Is Your Program?

Where are you today?

Planned

Where do you want to be tomorrow?








%		%
%	Major	%
%	Repeat-Increasing	%
%	Repeat	%
%	Annual	%
100 %		100 %

What's in your way?

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FINANCIAL SUSTAINABILITY BUSINESS MATRIX9.13.18

Presented by Dick Goldbaum, Transitions in Leadership

 High Mission Impact Low Profitability	4	High Mission Impact High Profitability	
 Mission Impact	3	 Cylinder C	
Profitability			
(\$20,000+)	(\$15,000)	(\$10,000)	(\$5,000)
		\$5,000	\$10,000 \$15,000 \$20,000+
 Low Mission Impact Low Profitability	2	 E	
	1	Low Mission Impact High Profitability	

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## SESSION 5: Contingency Planning

10.11.18

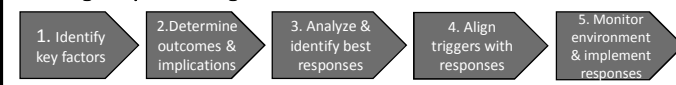
Presented by: Pat Knoerle-Jordan  
Experience on Demand

**Definition:** Risk mitigation process preparing an agency for potential challenges by navigating through worst-case scenarios to help ready itself for best responses if needed

Contingency Planning is used to:

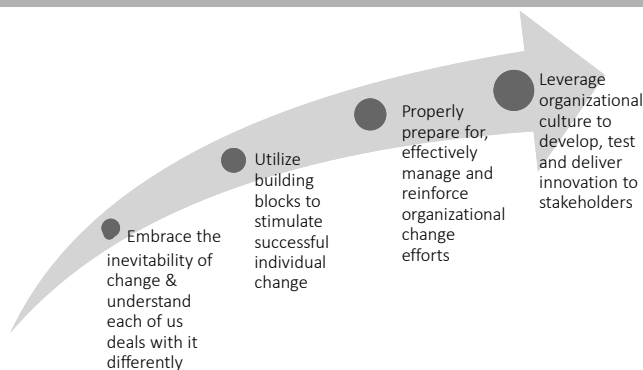
- Achieve higher degree of shared experience and organizational learning
- Raise/challenge widely held beliefs & assumptions about agency and its direction
- Identify key levers to influence future course; incorporate change management into strategic analysis; & intentionally mitigate future negative impacts

### Contingency Planning Model:

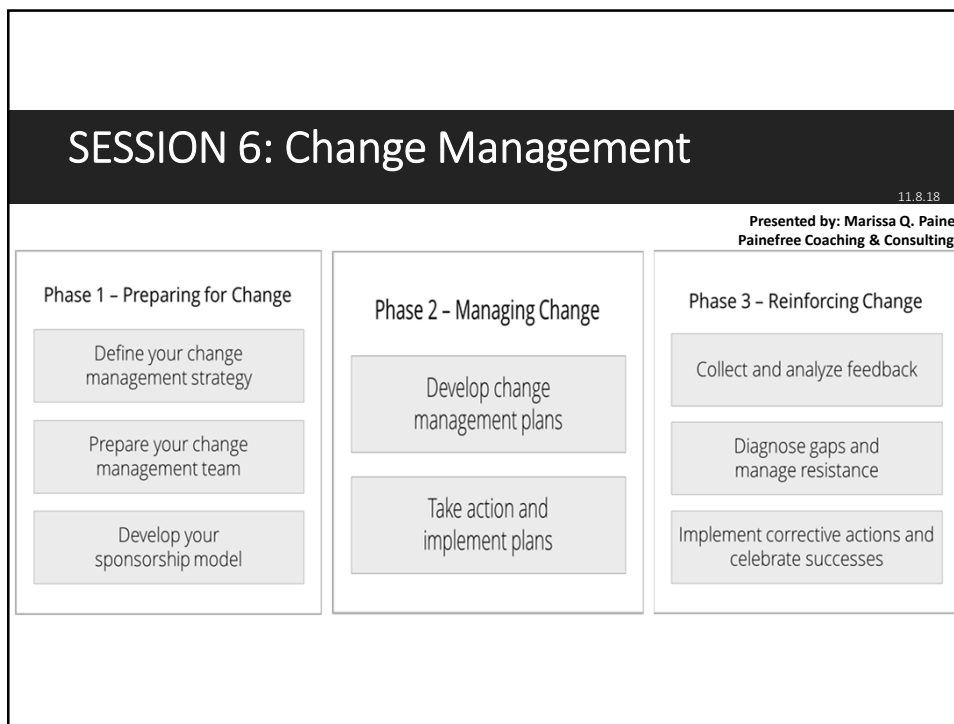


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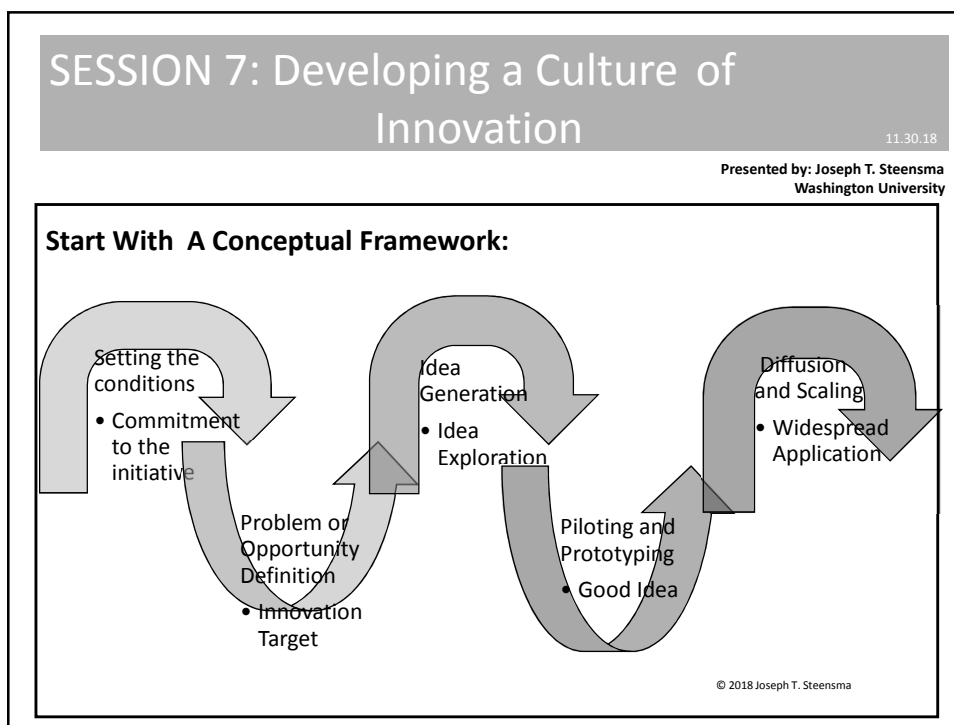
## STAGE 2: PREPARING FOR CHANGE AND INNOVATION



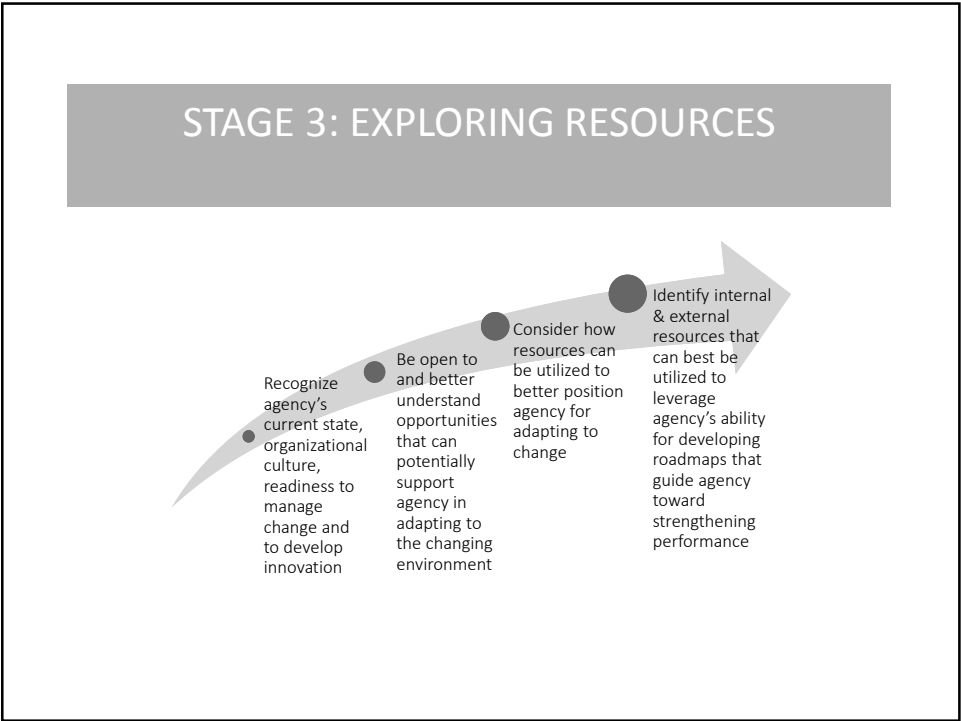
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SESSION 8: Applying a Racial Equity Lens –  
Exploring Ways to Advance Equity

Presented by: Kira Hudson Banks, PhD

**A PATH TO RACIAL EQUITY**

	Awareness of Inequity	Understanding of Why Inequity Exists	Transforming Towards Equity
Regional			
Institutional			
Individual			

Working On

Awareness	Understanding	Transforming
Awareness Education "Lifting the veil"	Uncomfortable • Learnings • Considerations History	Focus on data and outcomes New and intentional: • Habits • Policies • Choices • Behavior
Diversity, Inclusion, Tolerance, Cultural Competency, Race as a social construct	Institutional racism, Intersectionality, Internalized oppression, Internalized superiority	Disaggregated data, Racial Equity Lens, Structural Racism, Equity-driven strategy, Liberation

STC FORWARD THROUGH FERGUSON

TOWARD EQUITY

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## SESSION 9: Board Engagement in Fund Development

2.8.19

Presented by: Pete Werner, Nonprofit Consultant (P1) and  
Wendy Dyer, Wendy Dyer Fund Development Consultants (P2)

**P1/ Board Engagement in F/R requires:**

- A partnership structure
- Potential tough decisions re: current board membership
- Recruiting & onboarding new members in a strategic and intentional manner
- Members understand the business model
- Members always ask questions & evaluate progress/results
- Strategy in how to ask the Board to fundraise
- Focus on mission, passion & program understanding
- A compelling case statement members can deliver

**P2/ Crafting Compelling Messages**

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## Session #10: Optimizing Board Effectiveness

3.8.19

Presented by: Larna Godwin  
Vector Communications

**Gold Standard Boards:**

- ❑ Meet regularly with majority of members attending
- ❑ Understand/perform legal & fiduciary responsibilities
- ❑ Set policy & direction; provide financial oversight; monitor organizational performance (programs & services); hire, evaluate, guide and support CEO
- ❑ Utilize Committee structure to reflect agency strategic priorities & change as needed
- ❑ Strong Board Chair-Chief Executive partnership
- ❑ Board meetings focus on problem solving, inquiry, exploring root causes/new ideas
- ❑ Strategically select Board candidates to advance agency's work
- ❑ Conduct ongoing training about agency, its programs, field & landscape
- ❑ Participate in fundraising; advocate for agency; serve as ambassador
- ❑ Complete annual individual member self-assessment; and periodic board assessment

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## SERIES ROLES & RULES

### Roles

#### Facilitators

- Guides learning and sharing
- Conducts exercises
- Maintains schedule

#### Participants

- Are open to learning
- Share knowledge & insight
- Check for understanding

### Rules

- Manage your comfort
- Listen actively
- Ask questions and encourage others to share
- Minimize distractions
- Respect all views and opinions
- Enjoy yourself!

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## Member Agency Strategic Transition Planning Series

Please contact Julie Simon at  
[Julie.simon@stl.unitedway.org](mailto:Julie.simon@stl.unitedway.org)  
with questions, comments or concerns

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United Way of Greater St. Louis  
STRATEGIC TRANSITION PLANNING SERIES  
Session #11:  
Deeper Dive Into Fund Development  
April 12, 2019



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SESSION PURPOSE

Outlines ways to improve efforts of operationalizing and implementing development plans and their key elements for generating increased gifts, especially major individual gifts.



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## LEARNING OBJECTIVES



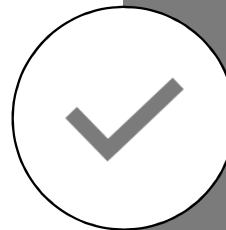
### Participants will:

- Better understand best practices related to each of the private sector revenue streams.
- Advance learning on how major gift relationships provide an outstanding return on fundraising investment.
- Improve knowledge about how to incorporate healthy habits into your agency's fundraising program.
- Gain insight on digital fundraising opportunities, such as persuasive technology, social media and other platforms.

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## Today!

- Recap of 2 previous fundraising sessions
- Multi-channel approach including technology
- Deeper dive into best practices
- Racial equity lens in a diversified world



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## Recap and Key Take-Aways

### Development Plans

- Simpler the better – whatever makes you move
- Include gift tables in your healthy habits

### Different funding models

- Don't beat yourself up

### Return on investment

- Cheaper to keep donors than attract new ones
- \$1.25/\$1.00 vs. .10/\$1.00 for major gifts

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## Knowing Your Return on Investment

Grants =  $.20/\$1.00 = 400\%$

Events =  $.50/\$1.00 = 100\%$

Major Gifts =  $.10/\$1.00 = 900\%$

Mail appeals =  $.20/\$1.00 = 400\%$

Donor acquisition =  $1.25/\$1.00 = (-)200\%$

Costs more to secure new donors – yet we look for new donors rather than seeing what we can do with the ones we have!

3 out of 4 donors NEVER COME BACK!

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# Recap and Key Take-Aways

## Donor retention challenge

- Predicted to slump to 20%
- Imagine replacing 80% of your donors EVERY YEAR

## What donors want

- 1.To be known and valued
- 2.To know where their money was spent
- 3.To know the difference their donation made

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# Recap and Key Take-Aways

## Adding some sizzle to your message

- All we have is what we share so make it sizzle
- Use anger vs. pity
- Make your message relatable

## Fundraising in the digital age

- So many options – come with a cost
- Take a deeper dive into opportunities and challenges

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## What We Know Now

(Online growth is accelerating at a fairly stable pace)

- Total online revenue grew by 23% in 2017, after 15% growth in the year before.
  - Revenue from online one-time gifts increased by 19%
  - Online monthly giving revenue increased by 40%. Monthly giving accounted for 16% of online revenue in 2017, after 14% of all online revenue in 2016
  - Email messaging drove 28% of all online revenue in 2017.
- 
- Digital Fundraising provides nonprofits with an opportunity to engage donors in a way that's both educational and entertaining
  - Digital Fundraising creates an opportunity to craft an omni-channel experience that engages donors through THEIR consumption habits
  - Digital Fundraising allows for a deeper engagement with the nonprofit driving donor behavior beyond a single campaign



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## Setting the Stage: Shared Language

- **Digital Fundraising:** All online/electronic ways to raise charitable dollars
- **Social Media Network:** Websites and applications that enable users to create and share content or to participate in social networking.
- **Micro-Giving:** Charitable donation of small increments of money from a single donor to a specific recipient.
- **Crowdfunding:** A method of raising capital through the collective effort of donors through a particular platform
- **Predictive Analytics:** A branch of advanced analytics that uses many data techniques to make predictions about future behavior
- **Persuasive Technology:** Technology that is designed to change attitudes or behaviors of the users through persuasion and social influence
- **Marketing Automation:** Technology that helps organizations streamline their prospecting, donor acquisition and retention, and ROI measurement.



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## Breaking It Down:

### Your Website Your Emails

- Nonprofits raised \$1.13 per website visitor in 2017.
- While website traffic declined slightly in 2017, Education, Environmental, and Health sectors increased in website visitors per month.
- Half of nonprofit website traffic came from mobile (40%) and tablet users (10%), with remaining 50% from desktop users.
- Email list size increased 11% in 2017 (slower rate than previous years) and nonprofits sent more emails total.
- Email revenue increased by 24%, accounting for 28% of all online giving.
- Despite these increases, fundraising email response rate declined by 6% to .06%

#### **Takeaway: Functionality/Mobile Platform Matters**

**Your Website + Email Function AREN'T ENOUGH**

**Money still comes from Desktop Users**



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## Breaking It Down:

### Social Media Channels

- Facebook posts on average reached 7% of a nonprofit's Facebook page fans, while 38% of the audience reached was not following the nonprofit on Facebook
- The Engagement Score (engaged users divided by total page fans) for an average Facebook post was 0.44%. Facebook is doubling down on its Commerce Features – WITHOUT charitable fundraising fees.
- Instagram was the fastest-growing of the three social media platforms, with a 44% increase in the number of followers. (And Twitter at 15%)

#### **Takeaway: If Facebook isn't a strategic part of your Fund Development Plan & Communications/Marketing Strategy, GO THERE NOW.**

**Test Digital Advertising**

**Retention! (Generosity is a Habit)**



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## Breaking It Down:

### Crowdfunding & Peer-to-Peer

- Crowdfunding has become one of the most popular ways for individuals to raise money for a cause, project, or event.
- On a global scale, the average success rate for crowdfunding is 50%.
- Industry projected to grow to more than \$300B by 2025 (less than 1% is Charitable (\$5.5B) . Currently, \$17.2B in North America
- The serendipity of Emergent Opportunity + Facebook + Crowdfunding
- Average Donor is 24-35 ("Millennial" Generation)

#### Takeaway:

**There are many options (191 in the US) – research fees structure, state law as it relates to online fundraising**

**Gen Z, entering the workforce now, grew up with this norm.**



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## Breaking It Down:

### Micro-Giving

- Micro-Giving should be thought of as part of a small gifts program.
- Small gifts have been known to provide major funding for organizations.
- True micro giving programs have played major roles in disaster relief fundraising — 2005 tsunami, Hurricane Katrina, & 2010 Haiti earthquake.
- Impulse giving goes hand-in-hand with micro-giving.
- People have been shown making multiple gifts (e.g. when asked for support for initiative A, then B, and then for C, donor is more likely to give two or more times than if asked for three separate gifts solely to one of the initiatives.

#### Takeaway:

**A micro-gift request needs to be tied to a specific need with a specific defined outcome resulting from the gift.**

**Micro-giving programs offer a gateway for potential donors to engage at ever higher levels with an organization. Today's small giver has the opportunity over time to become a major donor.**



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Breaking It Down:


Predictive Analytics & Persuasive Technology & Marketing Automation

Organizations are turning to predictive analytics to help solve difficult problems and uncover new opportunities. The goal is to go beyond knowing what has happened to providing a best assessment of what will happen in the future.

Insights from psychology and behavioral economics about how and why people make certain choices, combined with digital technologies, social media, and smartphones, have enabled designers of websites, apps, and a wide variety of other products to create sophisticated persuasive technologies.

Using marketing automation software that creates personalized appeals and puts potential givers on individualized pathways into the organization will drive deeper engagement with your nonprofit's mission or even specific program.

**Takeaway: Keep an eye on evolving technology!**  
**For smaller agencies, Marketing Automation is the most cost-effective way to test newer technology**




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Where to start?

(Hint: Start with the end in mind!)

- How does your agency currently use data captured from existing online giving platforms?
  - What is working for you? Email? Social Media?
  - What does your data tell you about donor behavior?
- What do you hope to gain from including technology and digital strategies in your fund development plan?
- Who are your donors? How do they give?
- Generally, who's not giving to you?
- And, what platforms haven't you tested?
- What are you scared of/waiting for?
- What is an acceptable ROI to get started?




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**Your Turn:**

**A Deeper Dive**



**Refer to your organization's Strategic Plan or Development Plan to address the following Reflection Questions:**

- Where does technology show up in your current plans?
- What can you do NOW to update your current strategy with a tech component?
- What can you do this year to test new technology strategies?
- Where do you need to make budget considerations for future planning?



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**Recap and Key Take-Aways**

**Time to rethink:**


- Your website and email strategies need tweaking
- How we gather information about our donors

**Social Media**

- Run, don't walk, to Facebook (and Twitter and Instagram)

**Just because we can.....**

- Doesn't mean we should!



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## Practical Applications

Donor retention will only get tougher

80/20 is already 90/10

Probably will be 95/5 or Likely 95/5 or even 99/1

Tax reform and growing income gap

•Wealthier people lose compassion with more wealth

We tend to do what we like to do – direct mail and digital fundraising is comfy and safe

Still a great platform for major gifts

David Luckes theory still holds today

Donors aren't accustomed to hearing from us

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## We Only Talk To Donors...

....when we need money

Foundations when the grant or report is due

Corporations when we want another sponsorship

Individuals when we haven't heard from them

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Foundations

- Should be treated like major gift donors
- Send an update even when it's not asked for
- Invite them in once a year
- Refresh your outcomes when they're stale
  - Invest time in research to open new angles
- 78 • i.e. a camp isn't just a camp
- Make certain you're asking for the right amount
  - New applicants need not go in low
- Keep an eye on DAF's!
  - Huge increases, not regulated yet, Fidelity is largest donor in the WORLD – once you make one, it's not your money anymore

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Corporations

Make sure their missions align with yours

- Should MADD accept money from AB-InBev?
- Should an environmental company accept money from Peabody?

What demographics do you have that the company wants?

- Older population, i.e. pharmaceuticals, PT's

Getting harder to 'make the case'

- What's your experience lately with corporate giving?

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**Individuals**

- For foreseeable future will always represent largest bucket**
  - Even during the Great Recession, individual giving remained relatively steady
  - Foundations took the biggest hit
- There is no blueprint like a grant or event**
  - Takes intention, strategy, determination
- Change our behavior to change our donor's behavior**
  - Throw out the old language we grew up with, i.e. cultivate, low hanging fruit – these are PEOPLE – nurture the relationships and be donor-centric

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**Gratitude and Stewardship**

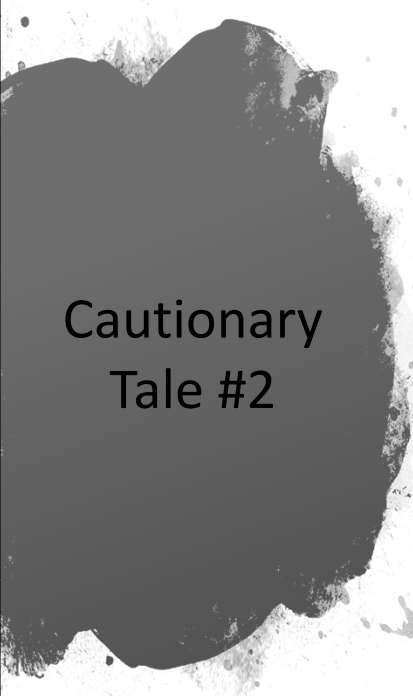
- Cautionary Tale #1
  - Tax reform forced payout of pledges
  - \$34,000
    - 1 @ \$10,000
    - 2 @ \$5,000
    - 1 @ \$2,800
    - Many other smaller gifts

*Guess how many phone calls of thanks?  
How did that money get spent? What did it accomplish?*

What would you do? How would your Development Plan capture it?

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## Cautionary Tale #2

- WWYD?
- Generous couple identifies 15 nonprofits and sends \$1,000 to each of them
- They narrow their favorites to 3
  1. What do you think they were looking for?
  2. What if your organization made the cut – what will you do moving forward?
  3. What if you discover them to be a lapsed donor 2 years later?

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## Cautionary Tale #3

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Family Foundation gave \$100,000 in 2016

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Some type of disenchantment but with predecessor so you really can't be sure what happened

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No gifts since then

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Main contact died and now you can't reach the next in line, despite attempts at letters and calls

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What do you think happened? What do you do now? How could your Development Plan have avoided this situation?

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## Let's Move On!

In long-run, individual giving – particularly major gifts – is best return on investment

Gift table explains why

- Rooted in theory but excellent in practicality
- Could replace your Development Plan!!

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## Gift Tables – Excellent Planning and Execution Tools

**\$200,000: top 2 @ 20%; next 4 at 20%**

Gift	Quantity	Prospects Needed	Cumulative Categories
\$20,000	2	8	\$40,000
\$10,000	4	16	\$80,000
\$5,000	8	24	\$120,000
\$2,500	12	36	\$150,000
\$1,000	20	60	\$170,000
\$500	30	90	\$185,000
\$250	40	80	\$195,000
<\$100	many	many	\$200,000

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## Gift Table – lost 1 of the largest gifts – WWYD?

Gift	Quantity	Prospects Needed	Secured	Cumulative
\$20,000	2	8	1	\$20,000
\$10,000	4	16	4	\$60,000
\$5,000	8	24	8	\$100,000
\$2,500	12	36	12	\$130,000
\$1,000	20	60	20	\$150,000
\$500	30	90	30	\$165,000
\$250	40	80	40	\$175,000
<\$100	many	many	Many	\$180,000

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## Annual Fund/Major Gift Planning

Gift	Quantity	Prospects Needed	Identified	Cumulative Categories
\$20,000	2	8	Joe Blow; Nancy Fancy	\$40,000
\$10,000	4	16		\$80,000
\$5,000	8	24		\$120,000
\$2,500	12	36		\$150,000
\$1,000	20	60		\$170,000
\$500	30	90		\$185,000
\$250	40	80		\$195,000
<\$100	many	many		\$200,000

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Challenge

- How do you know how much to ask for?
  - Important to put \$ into context so people understand the need – include in Development Plan!
  - Future behavior best predicted on past
  - 5 and 10; 3 and 5
  - Donor analytics
  - Formulas

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First,  
Determine  
Net Worth

Real Estate - *Wealthier individuals have a lower percentage of assets in real estate, requiring a higher multiplier*

- Value < \$400,000: Total real estate holdings x 2.5
- Value \$400,000-999,999: Total real estate holdings x 4
- Value \$1 million+: Total real estate holdings x 5

Securities - *Wealthier individuals have a higher percentage of assets in securities, requiring a lower multiplier*

- Value of publicly held stock x [3-6]
- Value < \$150,000: Stock value x 6
- Value \$150K-\$1 million: Stock value x 4.5
- a Value > \$1 million: Stock value x 3

Private Company Ownership:

- Value of 100%-owned company x 2

Income:

- Estimated salary x 10

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Second,  
Estimate  
5 Year  
Giving  
Capacity –  
all  
Charities

5% of estimated net worth (3% if based solely on real estate valued at < \$400K and 4% if \$400-599K)

Blend their capacity with your financial need

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When Do  
You Ask?

When they give you permission to ask

Start with Discovery Conversations

- Put the money and need into context
- Make it relatable to them

Follow up as promised

- Answer their questions/concerns – ask for permission to follow up again/“When would be a good time to talk about what you might like to do?”

Ask when they allow it

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## Cautionary Tale #4



High wealth donor living in L.A.



Huge mover and shaker in his field



Learned that he's an egomaniac



Made a pitch for \$50,000



Said "No"



The months roll on – do you stay "pleasantly persistent" or do you run away?



What do you do? What do you think happened with this donor? How does your Development Plan account for these types of scenarios?

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## What If...

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....you are ready to make the pitch and they hand you a check for \$5,000?

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Do you hand it back? Why or why not?

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## Famous Ask Lines

*We need \$\_\_\_\_\_ to make \_\_\_\_\_ possible. A donor just came in with \$\_\_\_\_\_ and we were thrilled! What do you want me to ask you for?*


*I'd like to ask you for \$\_\_\_\_\_ but the reality is I don't know how this fits into your philanthropy so let's talk about that a bit.*

*I may be out in left field but I do know that in order to \_\_\_\_\_, we need \$\_\_\_\_\_ - can you see yourself doing something like that?*


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And then....Stewardship




You can NEVER thank someone enough – it's impossible



Devote considerable time to stewardship



Build it into your healthy habits and Development Plan



What are some new ways you can show appreciation?

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# Prospect Management (in software ideally)

PROSPECT	WHAT DO I KNOW?	WHAT DO I WANT?	HOW CAN I GET THERE?	WHO & BY WHEN
Joe Shmoe	Attended gala and bought a lot of stuff at the auction	\$10,000 donation annually to support one family in need	Need a connector to Joe – research who brought him to the gala and do a 6 degrees of separation exercise	Wendy by 6/1
Jane Juddy	funny lady – does Improv; 2 kids in college and 1 in high school; special interest in domestic violence because of sister	?	?	?

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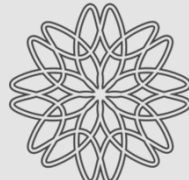
# Using a Lens for Racial Equity

Embedding the lens into your  
Development Program

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# Racial Equity & Fund Development




**GLADIATOR**  
consulting

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## A Quick Recap: What is Racial Equity Anyway?

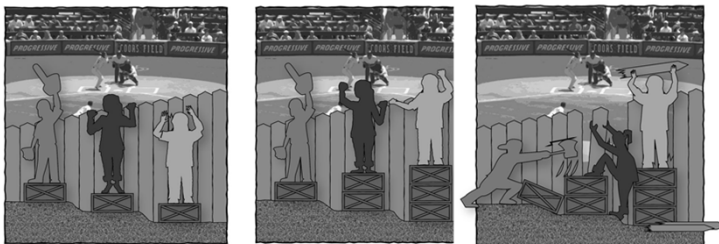
Lens	Process	Outcome(s)
The questions we ask of and to ourselves and our organizations in preparation for the work.	As a <b>process</b> , we apply racial equity when those most impacted by structural racial inequity are meaningfully involved in the creation and implementation of the institutional policies and practices that impact their lives.	<p>Intentional evaluation of project, proposal or process examines how its implementation will sustain, narrow or expand racial inequities in the region</p> <p>Racial Equity is a state where outcomes can no longer be predicted by someone's race</p>

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A  
Concept  
that  
Keeps  
Evolving



The cartoon consists of three panels. In the first panel, labeled 'EQUALITY', three people of different heights are standing on a grassy field, each holding a baseball bat and trying to hit a ball over a fence. The shortest person cannot see over the fence. In the second panel, labeled 'EQUITY', the tallest person has moved their bat to the back, and the middle person has moved theirs to the front. The shortest person still cannot see. In the third panel, labeled 'JUSTICE', the tallest person has moved their bat to the back, and the middle person has moved theirs to the back. The shortest person can now see over the fence and hit the ball.



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Is IDEA  
relevant or  
valuable to  
my  
organization?

Decide it's  
Important

Make it  
Formal


Make it  
Informal

Manage  
Measure  
Tweak

- ❖ Well..... is it?
- ❖ Who says? Do they matter?
- ❖ Who agrees? Do they need to?
- ❖ How does it look? (or not look)

**Bottom Line: Change doesn't necessarily start from top-down leadership; it happens at every level. We can *all* be leaders if we choose to be.**

- ❖ Look at your data, form a statement and take action.



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## Where to start?

### ➤ Check Your Bias(es)

- What do you believe about your role and activities as a Development Professional?
- Where do you bring unconscious bias into the way you prospect, build relationships and ask?
- What systems and power structures do you/your activities enforce?
- What is one small change you can make to combat your own bias?

Tool: Harvard Implicit Bias Test



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## Who is supporting your organization's Culture of Philanthropy?

### ➤ In regards to your Board of Directors, other Key Development Volunteers and Staff?

- Composition/Matrix
- "Peer to Peer" Opportunities
- Personal Capacity vs Fundraising Effectiveness
- Regular Professional Development



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## Development Activities & Operations

- How do you identify/attract prospects?
- What is your criteria for qualifying prospects?
- Who asks for gifts?
- How do we thank & celebrate people?
- How do we use feedback from staff and donors to inform our fund development program?



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## Corporate & Foundation Giving

- This is a VERY complicated power structure
  - What could change look like?
  - How do we build transformative relationships with these funders?
- Harm Reduction vs. Achieving Vision
- How do we talk about our work in grant applications?
  - Code Words about Race
  - Avoid "Poverty Porn"
- What about Outcomes and Outputs?




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Donor  
&  
Other  
Stakeholder  
Communication

- How do we communicate with stakeholders?
- What data do we have about who receives and responds to our appeals?
- Do Generational Labels & other Stereotypes hold us back from raising more money?



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Change is  
HARD

Donor  
Centered  
Fundraising

Community  
Centered  
Fundraising

Nonprofit AF, Vu Le



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## Racial Equity Lens Application

A Case Study



### GenerateHealth

*Champions of Family and Community*




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connecting

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## Your Turn: Partner Discussion




**Refer to your current Development Plan or Guiding Document to address the following Reflection Questions:**

- What are your most immediate opportunities to shift your activities using a Racial Equity Lens?
- What are 2-3 short-term changes that could be tested in the current fiscal year?
- What are your anticipated outcomes?

**Now, Swap Development Plans with your partner!**

- What do you see as opportunities for your partner's agency?
- Share your thoughts and takeaways with your partner



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## Regional Data Resources

(Spoiler Alert: We have a TON of data)

- Forward Through Ferguson: A Path to Racial Equity
- STL Equity Indicators
- For the Sake of All
- Dismantling the Divide
- Make Work Work (Clark-Fox)
- Deaconess Foundation
- Missouri Budget Project
- The Women's Foundation of STL
- STL County CSF



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## Suggested Reading & To Do's

(Good for Team Discussion)

- ❖ Beloved Community – Equity Audit
- ❖ City of STL: Equity Indicators
- ❖ Forward Through Ferguson: (157) Racial Equity
- ❖ PolicyLink: The Competitive Advantage of Racial Equity
- ❖ LivingCities: Resources Tab
- ❖ Harvard: Implicit Bias Tests
- ❖ Local & Regional GARE
- ❖ “Moving from Charity to Justice” - Dorian O. Burton & Brian C.B. Barnes
- ❖ Power Moves – National Committee on Responsive Philanthropy




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## Recap and Key Take-Aways

- Your words matter**
  - How do we talk about our work and stakeholders?
- There is ALWAYS time to start and start over**
  - No one has ever seen what Racial Equity looks like
  - There are plenty of places our organizations can test new strategies
- Learning never stops and People CAN Change**
  - We all have an opportunity to be part of the solution
  - Centering your Fund Development Strategy in Racial Equity can be challenging.. And the returns are promising!



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## Closing Thoughts

“Justice will not be served until those who are unaffected are as outraged as those who are.” - Thomas Jefferson

“Fairness does not mean everyone gets the same. Fairness means everyone gets what they need.” - Rick Riordan

“Life is very short and what we have to do must be done in the now.” - Audre Lorde



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Keep In  
Touch



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Go Get It  
Started!




Thank you!



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