



Diversifying Nonprofit and Movement Revenue: A Call for Conversation and Action

Research and Editing Team:

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This discussion paper was developed for organization and movement leaders and their philanthropic partners and capacity builders, with funding to the LeadersTrust from the James Irvine Foundation. The goal is to spark conversation and action to increase the capacity of social justice organizations and movements to generate more independent and flexible revenues.

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Photo courtesy of Haas Jr. Fund

EXECUTIVE SUMMARY

Movement leaders are increasingly seeking to diversify their organizations' funding beyond traditional revenue streams. While foundation grants and government contracts often play an essential role in a nonprofit's resource mix, they frequently come with restrictions that can inhibit organizations in their efforts to respond nimbly to rapidly evolving situations or urgent needs. Restricted funding also can limit the ability of nonprofits and movements to engage in the full spectrum of strategies and tactics to build power and achieve their policy goals over the long term.

Independent revenue, or money raised from sources other than grants and contracts, provides more flexibility and poses far fewer limitations for nonprofits. Potential sources of this independent funding include small donor programs, memberships, events, and social enterprises. But many organizations do not have the capacity to tap these vital streams of support.

This paper aims to provide a starting point for conversations about how to increase individual giving to power-building organizations and movements. Our focus is on what it would take—in philanthropic investments, capacity building, changes in practices, mindsets, and more—to truly expand traditional revenue streams. The paper is based on interviews with nonprofit and movement leaders, consultants, and funders and further informed by a review of recent studies and capacity-building initiatives.

The paper is divided into three sections, reflecting major themes that emerged in the research and interviews. They are:



ONE: Shifting Mindsets About Fundraising

The first section of the paper reflects on some of the positive shifts in mindsets and approaches to fundraising that are already under way among organizations and movements working on social justice issues—and what it will take to help these shifts take root and grow. These new and evolving ideas include:

- **SHIFT #1: “INDEPENDENT REVENUE SUPPORTS SELF-DETERMINATION AND FREEDOM.”** Individual giving offers organizations the flexibility to act on urgent needs and priorities, and to take advantage of emerging opportunities, without the restrictions of foundation grants or government contracts.
- **SHIFT #2: “ORGANIZING, COMMUNICATIONS, AND RESOURCE GENERATION ARE NOT SEPARABLE.”** Fundraising is organizing, and messaging and digital communications are crucial to both.
- **SHIFT #3: “RAISING RESOURCES IS A SHARED RESPONSIBILITY.”** Development directors cannot do this work alone; organizations and movements need to build and sustain the fundraising capacity of their entire board and staff teams.
- **SHIFT #4: “ORGANIZATIONS AND MOVEMENTS APPROACH FUNDRAISING WITH AN ‘INVESTMENT MINDSET.’”** Shared responsibility for fundraising starts with a deeper understanding of all sources of an organization’s revenue, as well as the costs and returns associated with each one.
- **SHIFT #5: “WE TRANSFORM HOW WE THINK AND FEEL ABOUT MONEY AND FUNDRAISING.”** Asking for money doesn’t come easy for everyone. As we broaden responsibility for resource development, it’s important to understand our varying experiences and perspectives vis-à-vis money, while reframing fundraising so it’s not about scarcity.
- **SHIFT #6: “FUNDRAISING CAN BE ABOUT LOVE RATHER THAN CHARITY.”** Placing love and belonging at the heart of fundraising can make it more empowering and lead to greater success. Shifting from a charity frame expands the possibilities of who belongs, how they contribute, and what it looks like when we all win.



TWO: New Ideas About What Nonprofits and Movements Need to Generate Flexible Revenues

Research and interviews for this paper surfaced growing consensus around a core set of investments and supports that nonprofits need to generate sustainable revenues.

These include:

- **MORE GENERAL OPERATING SUPPORT.** General operating support is critical to nonprofit sustainability, including the ability to invest in fundraising capacity.
- **DEDICATED FUNDING FOR RESOURCE GENERATION AND PEER LEARNING.** In addition to general operating support, nonprofits need dedicated funds to bolster the staffing, capacity, and systems that will support them to generate more flexible revenues.
- **LEADERSHIP AND PROFESSIONAL DEVELOPMENT FOR FUNDRAISING LEADERS.** Our movements need more people who are leaders in generating revenue and also in seeding new ways of thinking about and carrying out this critical work.
- **MORE SUPPORT FOR ASSESSMENT AND PLANNING.** Veteran fundraisers and intermediaries lift up the importance of organizational assessments of fundraising opportunities, what it would take to tap them, and the organization's readiness to go to the next level in its resource generation work.
- **ACCESS TO DATA AND EXPERTISE ON DONORS.** Adequate or equitable access to expertise on high net worth donors, as well as mid-level donors and major giving, is lacking across the field; connecting more organizations to expertise on these and other topics is essential.
- **EXPERIMENTATION AND INCUBATION SPACES.** The past several years have seen a surge in creativity and experimentation in fundraising for social justice; nonprofits need spaces to share their learning and what works.



THREE: Questions for the Path Forward

The research interviews revealed optimism and excitement about expanding nonprofit revenue sources beyond foundation and government dollars. These conversations also surfaced a range of insights and ideas about exactly what it will take sustain and scale this work. The third section of the paper highlights some questions to further this thinking in ways that can lead to experimentation, action, and, hopefully, results.

What This Paper Is (and Isn't) About

The purpose of this paper is to offer a starting point for discussion among organization and movement leaders, funders, and capacity builders about how to increase individual giving to power building and social change.

It is important to acknowledge up front that today's nonprofits are engaged in fundraising against the backdrop of a late-stage capitalist economy characterized by wealth inequality and scarcity-based systems of competition. As the fundraising associations acknowledge, the "profession" of fundraising in the U.S. is too white.¹ It is also too often unreflective of affected communities and tends to lionize wealth. Much has already been written about the ways in which philanthropy needs to change to support nonprofit groups, especially in BIPOC communities. These changes include: more multi-year, general operating support; less cumbersome processes for grantees; more transparency; increasing foundation payout rates; and so on.

Given this context, the focus of this paper is to prompt dialogue on what can be done within or despite the above constraints. The paper is not intended to provide definitive answers, but rather to explore a vibrant and changing landscape and perhaps identify new pathways to revenue that hold the potential for providing nonprofits with more flexibility, agency, and creativity in how they pursue their goals.

The paper is informed by insights and reflections from the following sources: 1) more than 30 interviews with executive directors and other movement leaders, development staff, fundraising consultants, funders, and intermediaries; and 2) lessons and research from the Reset Fundraising Initiative, a partnership of the Evelyn and Walter Haas, Jr. Fund and the LeadersTrust, as well as other initiatives, independent studies, and experiments in the field. The Appendices include a list of those we interviewed (Appendix A) and a literature review of resource documents (Appendix B).

Focus and Limitations

Although our research touched on many threads we could have pursued further, this paper mainly focuses on raising funds from individuals. Broader research on fund diversification from sources such as government, foundations, and business ventures is not included here.¹ In addition, various dimensions of individual giving, such as general fundraising trends, donor demographics, and technology (including AI) are out of scope for this exploration. The same goes for reform measures such as regulation of Donor Advised Funds, reform of the tax code governing 501(c)(3)s, or remedies for the Supreme Court's 2010 Citizens United ruling and its ramifications.

Finally, our use of the collective "we" and "our" throughout this paper reflects the intent that this paper serves as an invitation to movement and organization leaders and practitioners, philanthropic partners, and capacity builders to join in the conversation, and the belief that lasting solutions to increasing independent revenue generation will come from dialog, experimentation, and shared learning. This work must be owned—and advanced—together.

1. Additional promising, ambitious efforts to create income generating LLCs, including movement-owned voter data and engagement strategy vendors, Hard Knocks LLC (FL) and Black Fork Strategies LLC (OH), are well-documented by the New Left Accelerator, The Capacity Shop (NLA's sister 501(c)(3) for the State Power Accelerator (formerly the Independent Resource Generation HUB), a project of the Amalgamated Foundation. They are available here: <https://www.newleftaccelerator.org/resources>.



SECTION I. SHIFTING MINDSETS ABOUT FUNDRAISING



How we think about—and do—fundraising is evolving. Also evolving is how we talk about this work. While many continue to recognize and use the terms *fundraising* and *fund development*, others are purposefully extending definitions beyond money to encompass a range of support. Commonly used terms now include *resource development*, *resource mobilization*, *resource generation*, *revenue generation*, *fund diversification*, *development*, and so on. Rather than giving preference to one term, this paper reflects the increasingly diverse ways in which we are talking with one another about how to engage individuals as partners in contributing to and fueling organizations and movements.

This section highlights six core observations that emerged from the research and interviews about how mindsets and approaches to fundraising are already beginning to shift.



■ SHIFT #1: “INDEPENDENT REVENUE SUPPORTS SELF-DETERMINATION AND FREEDOM.”

Movement leaders are increasingly seeking to diversify their organizations’ funding beyond traditional revenue streams, such as foundation grants or public money. This means generating more “independent revenue,” which is defined as money raised outside of these sources, such as through small donor programs, membership programs, events, social enterprises, and other avenues. These funds have far fewer restrictions and can be used quickly, so organizations are able to be nimble and respond to rapidly evolving situations. Finally, and most importantly for multi-entity organizations, the money can be used flexibly to engage in the strategies and tactics needed to build power and achieve policy goals.

Unlike traditional 501(c)(3)s, multi-entity organizations—those using 501(c)(4)s, PACs, or LLCs—are free to pursue a broad range of activities, such as unlimited lobbying, partisan political activity, and support for candidates. These activities are critical in building power and advancing progressive change. Independent revenue is important to this work because, for example, small donors can be directed to an organization’s “c4” (for those not taking a tax deduction). These dollars may appear small, but even if they account for 10% to 15% of overall funds raised, they can be enough for building the power needed for progressive wins. This is why typical assessments that the ROI on these kinds of resource generation efforts is too low, or that “member programs are not worth it,” may miss the mark. And it is why, when asked, “What does liberation require of us?” Bethany Maki, executive director of Progressive Multiplier, says, “Independent revenue.”

“Multi-entity organizations allow us to use all the strategies at our disposal for building the power needed to win progressive policies. That’s why understanding the legal frameworks for multi-entity organizations and implementing the right financial controls is so critical. And it’s why we need to raise a diverse set of funds, including independent revenue.”

— Deborah Barron, Executive Director, New Left Accelerator

■ SHIFT #2: “ORGANIZING, COMMUNICATIONS, AND RESOURCE GENERATION ARE NOT SEPARABLE.”

In the past, groups often communicated with donors, their base, media outlets, and members as separate and distinct audiences. Nonprofit organizations are structured, in part, to reflect this reality, with separate fundraising, organizing, and communications departments and staffs. The problem with this orientation is that people today want to engage in causes they care about in different ways and through multiple channels—social media, email, text, volunteering, showing up for events, etc. A lot of people also want to further a cause through participation in actions and peer-to-peer fundraising.

In this evolving environment, a social media post can lead to a donation; a donation can lead to an email communication; an email communication can lead to an action; and so on. Consequently, organizing, development, and communications are more intertwined than they have ever been before. Indeed, it is often difficult to understand what “softens the ground” for deepening engagement in a nonprofit’s work or a cause and what triggers an action. In this context, communications—the ability to tell compelling stories—is critically important.



“The partnership between communications and fundraising is defined by how both embrace stories as powerful tools of action and change. Storytelling is how communications and development staff transmit strategic messages to targeted audiences, including potential donors.... The numbers, data, metrics, benchmarks, and pieces of legislation passed or defeated are important. But it’s the stories of dramatic personal transformation, human perseverance, courage, sacrifice, generosity, and love that make donors want to support something.... The stories are held by the entire organization, but are honed by the collaboration of communications and fundraising.”

— Robert Bray, former communications director, NEO Philanthropy and contributor to *Lightning in a Bottle*

Likewise, many advocates and activists today conceive of fundraising as *organizing*, fundraising as *movement building*, and fundraising as *central to power building*. All of these activities are rooted in building relationships and engagement, which is good news for organizers who do this well.

“We see organizing and fundraising as overlapping. We’re building bridges so donors see themselves as members of our organization and stakeholders in the movement alongside workers, and in solidarity, rather than supporting workers from outside the movement.”

— Stacy Kono, Executive Director, Hand in Hand

At the same time that the walls between fundraising, communications, and organizing are beginning to fall, some practitioners are challenging the paradigm of the “heroic” donor by explicitly aligning fundraising with equity and social justice principles and practice. Sparked by Nonprofit AF blogger Vu Le and nurtured by informal meetups over the past ten years, Community-Centric Fundraising is a self-described movement of fundraisers and other nonprofit professionals seeking to change how fundraising is done by centering economic justice, rather than donors and wealth.ⁱⁱ





■ SHIFT #3: “RAISING RESOURCES IS A SHARED RESPONSIBILITY.”

The challenges in recruiting and retaining fund development professionals are real and, some would say, dire. Concern about a crisis in hiring inspired research to unpack the issue in reports like *UnderDeveloped* in 2013ⁱⁱⁱ and *Beyond Fundraising* in 2016.^{iv} But what these studies revealed is that turnover in fundraising roles is more of a symptom than the core problem, demonstrating that the way we have been doing fundraising is, by definition, unsustainable.

Hiring a development director and giving them X years to raise X dollars from X number of new donors and funders is not a recipe for success. This work is not about one person, position, or department alone. Rather, many argue that everyone—staff, executive directors, constituents, board members, etc.—has a role to play in raising resources for the organization.

Some have referred to this reframing of fundraising from what a *development director* does to something an *organization* does as building a “culture” of fundraising/philanthropy.^v The fund developer’s role then shifts from going it alone to leading, inspiring, and supporting others to take part in fundraising. Sometimes, this can even make the job more rewarding and sustainable.^{vi} However, development staff still shoulder an enormous responsibility, and—if they are not effectively supported—tend to burn out, perpetuating the high turnover that plagues the field.

“Over the past ten years, I don’t think things have changed much in terms of the constant talent churn in development director roles. The pattern of executives looking for a unicorn ‘great development director,’ thinking they hired that person, and then firing that person eight months later, persists—the pattern that ‘this person will come in and raise our budget, create our individual donor program, and find 20 new foundations in the first year.’ Of course they don’t! And the development folks say, ‘I can’t solve this. I’m here to create systems, manage you, get you in the right places—and, yes, write some grants and make some asks—but I can’t do this singlehandedly.’ That pattern persists.”

— Jeanne Bell, Consultant (former longtime executive director of CompassPoint and co-author of *UnderDeveloped* and *Fundraising Bright Spots*)

Some have observed that nonprofits have been slow to fully embrace a more shared, or distributed, approach to fundraising. Granted, we still see examples of a strong executive director and development director effectively raising funds for a good stretch of time. However, when one or both of these individuals depart the organization, fundraising usually suffers significant setbacks.

So what does sharing responsibility for fundraising mean in practice? Angelica Salas, longtime executive director of CHIRLA, describes how its ten-year journey to a current membership base of 52,000 started with shared responsibility. Everyone in the organization needed to agree that membership was a priority. There was also a shared understanding that everyone with an entry point to CHIRLA—from street vendors and other low-wage workers, to immigrants with different documentation statuses, to high school and college students—had an opportunity to become members. The next step was building, over time, the infrastructure, calendar timelines, marketing expertise, and systems and processes for everyone to participate in membership drives. Angelica explains, “Membership equals power for social justice. It always has.”



Other organizations work toward shared responsibility by focusing on strengthening internal partnerships among and across various roles and functions: between the executive director and the development director; between financial management and fundraising (for budgeting and tracking fundraising goals and revenue); between communications and fundraising (for everything from a welcome series for donors to integrating an ask across channels); between the staff and the board; and so on.

It is against this backdrop that a small but growing network of practitioners are experimenting with and fostering rich conversations about how to develop more distributed—and more empowering—models. For example, proponents of “resource mobilization” seek to decentralize the practice of fundraising while re-envisioning the role as a shared responsibility:

“ Many fundraising models and ‘best practices’ center on the idea that wealthy donors are the heroes of the story. What would resourcing our missions look like if we were more like resource mobilizers deepening the civic and political journeys of all of our supporters instead? Resource mobilizers are people who facilitate the flow of both financial and non-financial resources. Resource mobilizers are not limited to executive directors, development directors, or other nonprofit staff; they also include unpaid organizers, neighborhood leaders, and volunteers.”
— Resource Mobilizers Collaborative^{vii}

In sum, there are many options—and questions—about how resource generation can be staffed and structured within an organization. Research and interviews for this paper surfaced broad consensus and a growing awareness that shared responsibility is a strong antidote to frequent staff turnover and lost fundraising momentum.



Photo: Amori Photography



■ SHIFT #4: “ORGANIZATIONS AND MOVEMENTS APPROACH FUNDRAISING WITH AN ‘INVESTMENT MINDSET.’”

Traditionally, fundraisers have been regarded as part of the “back office”—on the sidelines, in a support role, separated from program. This is not effective in today’s complex fundraising environment, especially for organizations engaged in organizing and power building. Development directors—or others who are leading fundraising—need to be at the strategy table, alongside finance and communications, as leaders in an organization.

Together, an organization’s leaders (including the development director) need to make strategic decisions about the level of revenues that will go to operations each year, and how much will be invested back into generating revenue for future years. Too often, not enough is invested in fundraising. Supporting revenue generation is especially important in cases where organizations are exploring the viability of new sources of revenue, such as small donor or membership programs. One rule of thumb is that experiments in fundraising take 24 to 36 months to break even. What’s more, these efforts often require additional investments to throw off revenue and/or drive growth.

Leadership teams need to understand all sources of an organization’s revenue—from individuals, foundations, government entities, members, events, and other avenues. They also need to understand the costs associated with each. Fundraising events are an example of a clear gap in awareness and understanding to the detriment of many organizations. Armando Zumaya, a career fundraiser and consultant, argues in his viral blog post, “Kill Your Gala: Why Galas Hinder Fundraising Growth at Small/Medium Nonprofits,” that the net proceeds from events, including staff time, are often not calculated, which can give a false perception of their return and detract fundraising staff from strategies that would generate more net revenue.^{viii}

Thinking in these ways about the totality of an organization’s “revenue engine” challenges us to adopt an investment mindset. This means making decisions explicitly so that an organization can track progress, make decisions, and learn and adjust over time.

💬 Revenue generation is part of your program. It’s no different than organizing people for your mission. Most executive directors that we work with have grown up through the organizing side of the house. Organizers—such as frontline BIPOC groups in the South I’ve worked with recently—are some of the most talented people you will ever meet. They can get people out to vote, get a ballot initiative through, know exactly where to put organizers, and how to move legislation. But the muscle for how to manage your revenue and expenditure portfolio, diversification, and what kind of infrastructure you might need to achieve it, that is where we need to build muscle. We need a mindset shift to invest in ourselves for the sake of us just being stronger and sustainable and having a path to scale. That needs to become part of our DNA.”
— Bethany Maki, Executive Director, Progressive Multiplier



■ SHIFT #5: “WE TRANSFORM HOW WE THINK AND FEEL ABOUT MONEY AND FUNDRAISING.”

Executive directors and development directors often encounter a stumbling block when they set out to broaden responsibility for raising resources across their organizations: for many people, talking about money and fundraising is enormously hard. Addressing this resistance often requires bringing staff together to learn about their varying experiences with money, including the pain many may feel because their families struggled while they were growing up. Another key is reframing fundraising not as “begging” or being in a “less than” position, but as inviting people to share in the vision and hopes for an organization and community—understanding that giving doesn’t take something away, but rather brings people joy. Although changing deeply held views and feelings about money does not happen overnight, it can happen.

Rhea Wong, a former executive director who is now a podcaster and consultant, helps nonprofit executive directors and development staff in their journeys to become leaders who inspire others (especially people of wealth) to engage and give. She describes the shift like this:

“There’s a lot of trauma, especially for folks of color, around money. Systemic trauma, racial trauma, intergenerational trauma, plus the trauma we experience just growing up in our households.

As fundraisers, we’re in this tension of holding all this history and this trauma at the same time that we are a bridge to wealth, and mobilizing wealth... And that wealth tends to be predominantly white, older and in many cases built on the very exploitation that we are talking about... We need to heal ourselves because I really believe, at the end of the day, fundraising is the most revolutionary thing you can do. You’re moving capital from one place to another to make change happen, to make the world a more equitable place.”

— Rhea Wong, interviewed by Isaiah Thompson for NPQ^{ix}

■ SHIFT #6: “FUNDRAISING CAN BE ABOUT LOVE RATHER THAN CHARITY”

Jeanne Bell, former executive director of CompassPoint, and Kim Klein, principal of the fundraising consultancy Klein and Roth and a longtime grassroots fundraising trainer and consultant, authored a report called *Fundraising Bright Spots*.^x The report was based on their study of a diverse and representative group of 16 progressive organizations across the country, many of which identified as social justice movement groups. They all had limited budgets and small staffs, yet their donor and member programs achieved sustained success over time. The study was unique in its focus on what was working, rather than on what wasn’t (thus, the name Bright Spots).

Based on a review of financials and interviews with executive directors, staff, board members, and donors of each organization, the researchers teased out the philosophy, mindsets, and practices that were common among them.² One finding that surprised them was this: how much the groups talked about love.

2. Please see page 30 of this report for detail.

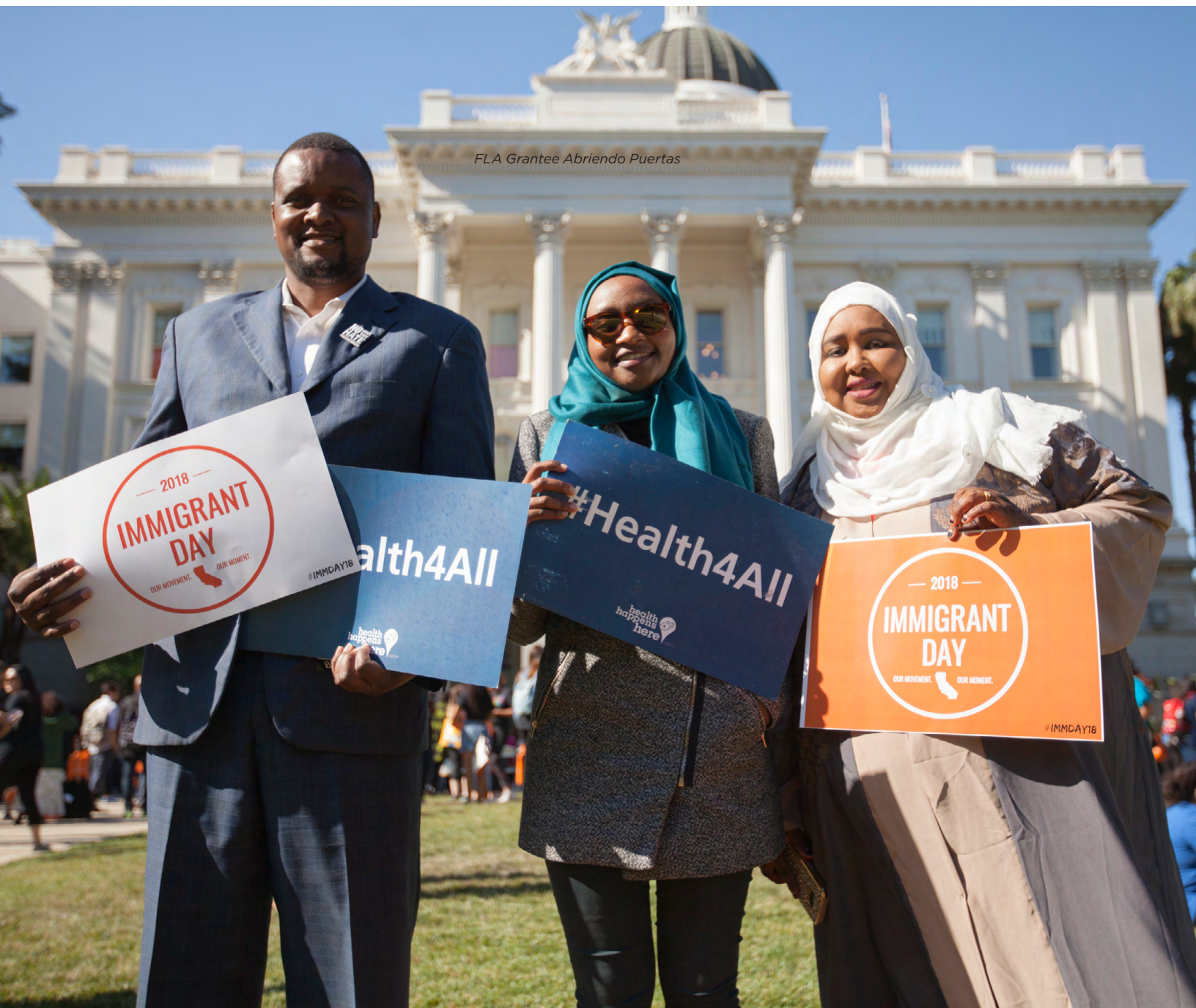


“ In our conversations with the Bright Spots, the word ‘love’ came up more often than one might expect in a study of fundraising success. Donors loving the organizations. Staff loving their donors. Leaders who have worked together a long time loving the work they do together. But then, perhaps this is 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.”

— excerpt from Fundraising Bright Spots

A large experiment to center love in fundraising has been underway for four years at the Oregon Food Bank (OFB). C. Nathan Harris, a veteran fundraiser from the LGBTQ+ movement, joined the OFB team in 2019 as director of community philanthropy. With the full support of OFB leadership, he began to transform its philanthropic model by “decentering money and centering love.” By prioritizing love among its community of staff, program participants, and donors, OFB has been tapping into the currency of connection and belonging. Fund development staff describe how this approach has made their work more empowering and aligned with the values that brought them to the nonprofit sector in the first place. OFB is transforming the donor experience by hosting educational seminars and gatherings for supporters on the root causes of hunger and needed policy solutions. The OFB story is one where a nonprofit has successfully integrated fundraising with movement building. Four years into its journey, OFB has changed its fundraising practices, built a 46% BIPOC staff (which is highly unusual in fundraising), and is raising resources at impressive levels.^{xi} OFB is showing how raising resources is as much about the heart as the head—and how love is a powerful motivator.

The six shifts described above emerged from the field research and conversations and highlight what is changing and what might be possible when it comes to transforming fundraising for power building and social change. Rather than presenting these shifts as an indictment of how fundraising has been done, this paper suggests that we take a fresh look at what is working—and what is worth adapting—as we explore more empowering and authentic models for engaging individuals in resourcing organizations and movements for change. The next section takes a closer look at what it will take to support these new mindsets, approaches, and pathways forward.



FLA Grantee Abriendo Puertas

SECTION II. WHAT NONPROFITS AND MOVEMENTS NEED TO GENERATE FLEXIBLE REVENUE



The research interviews with practitioners, funders, and capacity builders offered insights into how social justice, racial justice, and economic justice groups can best be supported in generating flexible revenue. Here is what people said nonprofits need most:



■ 1: MORE GENERAL OPERATING SUPPORT

Clearly, the foremost call to action for funders in enabling their nonprofit partners to be most effective is to (continue to) provide multi-year general operating support (GOS). Countless studies have repeatedly shown this one form of flexible funding trumps all others. In cases where funders might consider new investments in resource generation, the message from the field is clear: new investments should not be made at the expense of GOS.

General operating support is foundational for sustainability for many reasons. It frees up time that groups would normally spend on raising money. It eases fundraising pressures. And it offers greater flexibility to nonprofits in how they deploy funds. (This is especially true for organizations that seek to invest some of their resources in permissible levels of lobbying). A recent Irvine Foundation evaluation of worker rights groups established that strengthening the capacity of individual organizations is critical to collective work as well. More precisely, flexible funding like GOS supports the relationship building, ongoing communication and coordination, and infrastructure and strategy development that make collective work possible.^{xii}

Yet, organizations don't always feel comfortable or able to use GOS funds for investing in fundraising. Although GOS is intended to be working capital free and clear of requirements, and not a program grant with expectations for specific programmatic outcomes, in practice, this is not entirely the case due to funder expectations and competing priorities at the organizational level. An executive director of a movement group explained:

“General operating support grants are not really gen op, either on our end or our funders' end. If a health funder provides gen op, we need to deliver on health outcomes. A worker justice funder wants to see more worker protections. If a funder is prioritizing narrative in our field, then we need to do more storytelling. Using GOS funding for fundraising, when we won't even see results for a few years, is not what our funders would want and it's not what we want. It's a dilemma. Dedicated funding for fundraising is one solution, but given how different we all are, it would need to be flexible.”

■ 2: DEDICATED FUNDING FOR RESOURCE GENERATION AND PEER LEARNING

Beth Rayfield, a veteran development director and former organizer, is often consulted by social justice and organizing groups for advice and coaching on fundraising. Her message highlights the need to build capacity for this work, especially on the staffing side:

“The reality is that in most of our movement organizations, when we have a little money, we don't want to put it into development staff. We want to put it in policy advocacy or hire another organizer. And as a former organizer myself, I completely understand that. But especially in small shops, you're expecting a one-person development team to manage the same number of stakeholders as your five-person organizing team. Four Freedoms Fund is the only funder I'm aware of that has given long-term dedicated funding for development staff—and it makes such a difference.”

— Beth Rayfield, Director of Institutional Advancement, Rockwood Leadership Institute



Indeed, Adela de la Torre, who co-authored the *Lightning in a Bottle* study on how to retain donors after viral moments,^{xiii} recently observed how forward-thinking the Inland Coalition for Immigrant Justice (ICIJ) had been in investing in fundraising before seeing a return.

“ A big lesson for me was: don’t skimp on the nonprogrammatic side. I learned this from ICIJ. They invested a lot when they did not see payoff for some time. That’s a hard thing to do when you are running on a shoestring budget. You think, ‘Why am I paying for a donor database? Why am I spending time on individual fundraising?’ But you have to have hope, and they did very well at getting everybody involved and believing in themselves. There are so many organizations that are similar to ICIJ. We can learn a lot from what they have done.”

— Adela de la Torre, Deputy Director, Justice Action Center

What might be possible with more dedicated funding for fundraising? The Lemala Fund provides a case example. The fund was created in 2020 with the highly unusual mission to invest solely in fundraising capacity. It offers grants that can be used for anything from technology to staffing to testing a new approach—and the fund is sensitive to the realities of how long it takes for such investments to turn positive. The Lemala Fund provides support at \$100,000 per year for three years for about six organizations in a range of fields, along with peer cohort learning for executive and development directors. At four years old, the fund is still learning about impacts, but its preliminary evaluation shows the results are promising. For example, one cohort member, the Black Organizing Project, had received a surge in funding after the murder of George Floyd and a high-profile local campaign. With support from Lemala, they were able to mitigate the inevitable drop-off after this spike in funding:

“ Three years ago, we did not have a staff member dedicated exclusively to fundraising. With leadership from the ED, the current development team now includes a development director, individual donor manager, grants consultant, and bookkeeper. We invested in software like GrantHub and Instrumentl to help us track, manage, and prospect for our grants, while also assessing and pivoting away from older systems. Along with many Black community organizations, we wondered how we would sustain our capacity through the political moment when this philanthropic trend subsided. Through the ebbs and flows of the past three years, we were able to thoughtfully and meaningfully maintain our budget, our power, and our work.”

— Jasmine Williams, Development Director, Black Organizing Project^{xiv}





■ 3: LEADERSHIP AND PROFESSIONAL DEVELOPMENT FOR FUNDRAISING LEADERS

As discussed above, fundraising cannot and should not be the responsibility of one person. However, this does not diminish the critical importance of a strong development director. This role is complex and demanding, particularly in small- to mid-size organizations. It requires not only technical skills but also comfort and expertise in building relationships with donors, board members, volunteers, and colleagues. While a preponderance of basic “101” and technical training is available, higher-level professional development is hard to find. There is also a dearth of offerings that address the critical adaptive leadership skills required of the role. Lastly, development directors feel isolated and are hungry for opportunities to share their work strategies for feedback and learning with a community of peers.

The bottom line: Development directors need spaces to develop leadership capabilities *that are specific to their roles*. As Beth Rayfield notes, these individuals are often unique in touching all parts of an organization, coordinating and exerting influence “up, down, and across to be successful.” She adds, “They also need to learn how to build out their teams including the sequential nature of hiring; learn strategies for staff retention; get good performance from consultants, volunteers, and board members; have productive conversations with high-net-worth donors, and so on. They need places to go for this kind of guidance and help.”

While executive directors and organizers have access to various leadership development programs, scant attention has been paid to fundraising professionals. A common challenge for development staff, especially in movement organizations, is viewing themselves as leaders in their organizations—and for their organizations to see them as leaders. Yet development directors *must* be at the leadership table to advocate internally for the increased resources and structural changes they need to succeed.

The Rockwood Leadership Institute offered a promising model for this kind of support with its year-long Fellowship for Resource Leaders in 2019. Participants have pointed out that, from this one cohort, many development directors have not only stepped up their leadership in fundraising within their organizations, but are also spurring field-wide conversations about new ways of conceiving of fundraising in alignment with their equity and justice values.

“ The Rockwood Resource Leaders program was exactly what I needed in my journey as an organizational leader. I leave it feeling clearer about my vision, purpose, and role. I feel more powerful as a leader, a parent, and a person. I deeply believe that investment in this unique crew of people will make our organizations more powerful and sustainable.”

— Linda Lee, Associate Director, Chinese Progressive Association^{xv}

Pathways for new talent to learn about and enter the field are also urgently needed. Field-wide strategies, such as fellowships and placements, need to be supported. One solution: partnerships with organizations such as Movement Talent. Founded by Linda Nguyen, who came from an organizing background, this relatively new organization is creatively tapping talent pools, including in rural communities, for placement in various roles in movement groups. Movement Talent (and potentially other efforts) are positioned to make a crucial contribution to the bench strength for resource development.



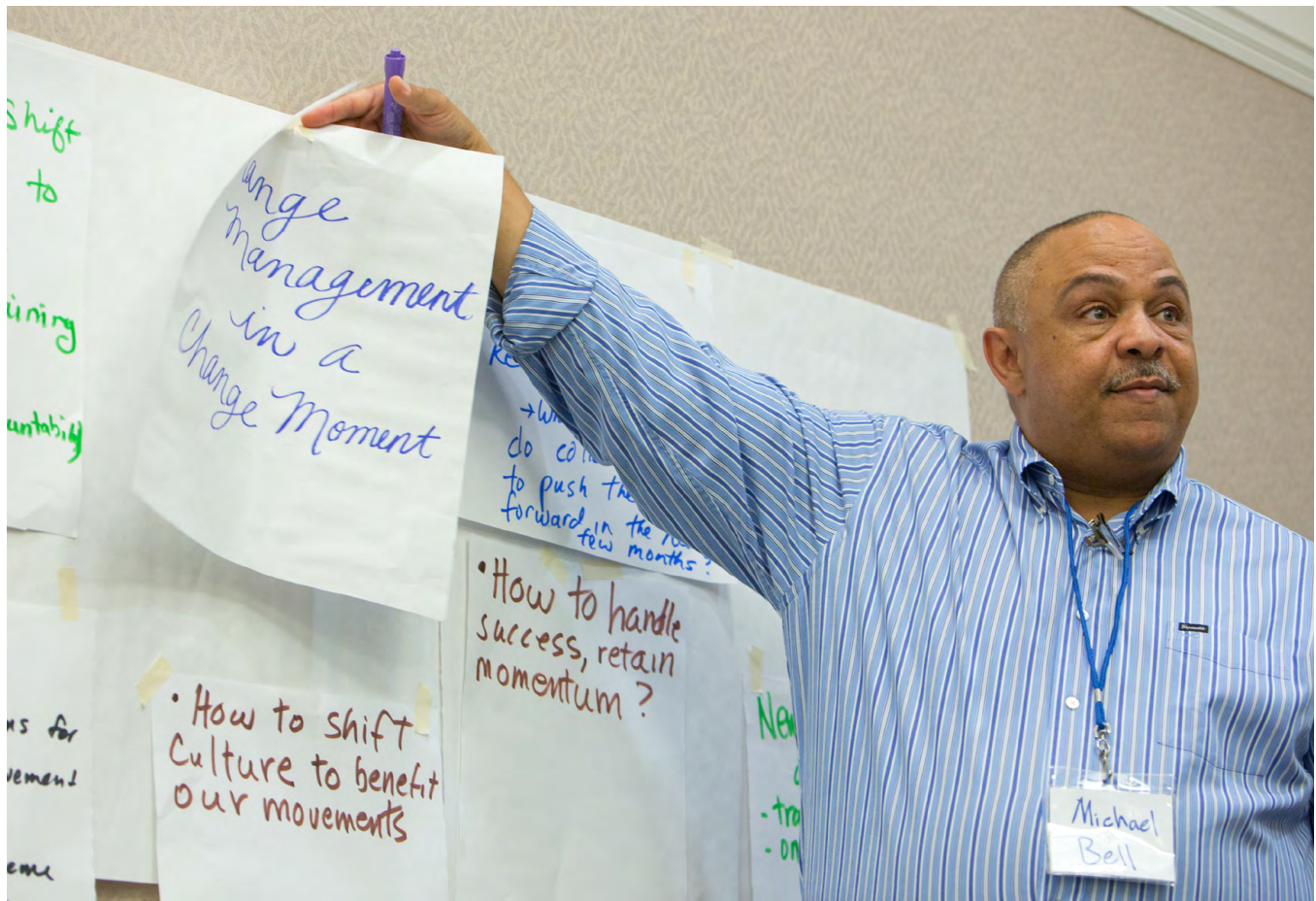
■ 4: MORE SUPPORT FOR ASSESSMENT AND PLANNING

Many of us wish there was a recipe for resource generation, with fail-proof steps that lead to greater engagement of supporters and increased revenue. Of course, there's no one-size-fits-all approach that works for everyone. One can start with a general template, but it needs to be tailored to fit each organization's mission, size, base and capacities—and implementation almost always involves the sometimes messy, sometimes exhilarating process of experimentation. That is why veteran fundraisers and intermediaries lift up the importance of a “solid, data-driven assessment” of opportunities and what it would take to tap them. Assessment also helps organizations avoid trendy tactics that may have worked well elsewhere but won't necessarily work for them.

Another critical step is assessing readiness—in other words, determining what needs to be in place to make any given approach successful. Intermediaries such as Democratizing Philanthropy Project (DPP) and Progressive Multiplier are beginning to zero in on the capacities groups need to develop for successful revenue generation. Vivian Chang, executive director of DPP, lifts up several readiness factors. These include staffing (including participation by cross-functional teams), foundational processes for engaging and retaining donors, and the experience and track record of the organization in mobilizing grassroots support.

Fundraising technology is another readiness factor. Funders typically have not had an appetite for supporting technology, and organizations are rarely able to adequately resource it. Often, systems have been cobbled together over time by different people. As a result, the CRM, financial software, and email/online donation systems don't smoothly integrate to support a multi-channel campaign that leverages email, socials, etc. And tracking what works across these systems can be complicated.

Capacity coach Michael Bell | Photo: Lydia Daniller





Over the last few years, many organizations have demonstrated a clear readiness to capture viral moments for long-term support—moments such as the Dobbs decision on reproductive rights, George Floyd’s murder, the Trump Administration’s Muslim Ban, and so on. The *Lightning in a Bottle* study chronicles the inspirational success of two organizations (one large and one small) that not only managed to experience rapid growth and an influx of donations and attention, but also maintained a larger base of supporters. Marjorie Fine, a co-author of the study and longtime grassroots fundraising consultant and trainer, explains that the success of these groups shows the power and the potential of assessing and supporting the readiness of nonprofits to leverage new and emerging opportunities for resource generation on an ongoing basis. “It’s not about the lightning, it’s about the bottle,” she says. “The bottle looks different for different groups, but it’s all about the bottle,” In other words, groups need the communications and data infrastructure in advance, with ongoing engagement of staff and donors—and readiness assessment is key. “It’s fun. It’s joyous. Believe it. Demonstrate it. Others will catch the vibe and follow you,” Marjorie says.

An executive director of a worker justice organization, in effect, summarizes the sentiments of her peers in describing a strategic approach for helping organizations increase independent revenue:

“If I could wave a magic wand...as a starting point, I would suggest a multi-year effort, which starts with a learning period alongside peers about revenue models and then developing strategies. You would be able to consider how the models might be a fit within the context of your own base, organization, your own plans for long-term growth, and your political profile. You could learn about which models have worked and not worked. It can’t be cookie cutter: the same strategies would not be a fit for every organization. Some might be done on your own. Some might be done in collaboration with others. Some might include an income generating business or project. Some might be a donor program combined with voter engagement. So, each organization would develop their own strategies. The second part would be flexible, financial support that would be provided to launch and implement whatever the organization chose to do. The funding would need to be flexible enough so it could be used for infrastructure or staffing or training or some combination, and long enough that it could become self-sustaining. Alongside funding: a consultant who could provide quick one-on-one customized assistance, just when needed.”

■ 5: ACCESS TO DATA AND EXPERTISE ON DONORS

While reaching different levels of donors (high net worth, mid-level, etc.) requires the same shifts in mindset and approach discussed in this paper, the specifics of what is needed to be successful with each audience can be very different. Adding to the challenge, donor benchmarking generally does not include data from movement groups, and macro-level donor trends are often too high-level to be useful. Reports, for example, that “the number of donors in the U.S. is decreasing precipitously” don’t paint a complete picture of all giving. The data may include charitable donations but not all contributions to multi-entity groups, or political giving. Data on large national organizations may be included, but not smaller organizations.

For practitioners, adequate or equitable access to expertise on high net worth donors, or mid-level and major giving, is lacking. Yet pockets of expertise do exist. For example, Mark Rovner and Alia McKee of



Sea Change Strategies have specialized in mid-level donors, conducting research on donor motivations and behavior and the engagement techniques that are most successful in reaching them. Mark and Alia consider mid-level donors to be underappreciated because they often give to organizations year-in and year-out without a lot of attention from the organizations they give to. They are deeply committed and tend to be working people who give generously vis-à-vis their incomes. In 2021, donors giving \$1,000 to \$10,000 annually represented only one percent of the donor population but were giving more than a third of the total dollars.^{xvi}

“It’s always on my heart and in my mind to be more in relationship with our individual donors and to expand our individual donor base. But for years we have not had the staffing and infrastructure to maintain relationships beyond our foundation partners to our dozens of individual donors. Yet, even though we have not had time to reach out to them, they have stuck with us, and that speaks volumes about how they feel about the value of our work. Even though it’s just a sliver of our income now, they are still so important to us. So, even though we definitely need more support for staff for institutional fundraising, instead we are hiring staff to focus exclusively on these donor relationships.”

— Alexandra Suh, Executive Director, KIWA (Koreatown Immigrant Workers Alliance)

The potential of these donors was borne out in some of our interviews. Many organizations would benefit from having more access to donor experts to assess how well positioned they are for attracting donors at various levels and what it would take to retain them.



Photo courtesy of Haas Jr. Fund



■ 6: EXPERIMENTATION AND INCUBATION SPACES

Recent years have seen an explosion of creativity in digital fundraising—due, in part, to changes in technology and how people communicate—that makes it possible to raise small donor revenue at scale. But movement groups, large and small, need time, resources, and expertise to experiment with what works.

One area of experimentation is taking tried-and-true approaches in mainstream fundraising (email solicitation, donor screens, website audits, matches) and adapting them to the social change context, either at the organizational level or for a collaborative campaign or ecosystem of organizations. This is precisely the focus of the Democratizing Philanthropy Project’s work to support launching and building effective digital email fundraising programs. Executive Director Vivian Chang shares their experience:

“Many groups are highly skilled at organizing and may have considerable expertise in voter engagement, but the muscle still needs to be built when it comes to fundraising: lead generation, adapting websites to make giving easy, a content calendar that inspires new audiences, etc. It also includes segmenting lists using tools such as Donor Search and tailoring requests for donations at the level people have given to other causes. Thus far, \$1 million has been raised by each cohort from 40,000 new, small donors, and capacity has been built to significantly grow these donor bases.”

While organizations working with DPP tended to be mid-sized civic engagement groups, others are focused on launching or expanding individual donor programs at grassroots organizations. For example, the Latino Community Foundation (LCF) launched a first-of-its-kind, 16-month accelerator for Latino nonprofits. The question at the heart of its experiment: “What if we invested in nonprofits the way we do in startups?” LCF also wanted to explore an approach to investing that is rooted in and celebrates Latino culture. The program provides funding, mentorship, fundraising coaching, a “loving community” of peers, and hands-on support for new collateral and upgraded websites. After four cohorts from 2017 to 2024, the program has proven remarkably successful at hitting its goal of increasing organizational budgets of participating organizations by 20%.

In another approach to experimentation, large immigrant rights organizations and a cohort of eight smaller groups set out to apply a variety of digital strategies for supporter engagement following the 2016 election. Called the “M3 Initiative” (money/message/mobilize), the effort supported these organizations to rise to the challenge posed by the new administration’s anti-immigration policies by adopting an integrated, cross-functional approach to raising awareness (message), engaging supporters (mobilize), and attracting needed funds (money).

As featured in the *Lightning in a Bottle* report, two of the organizations, the National Immigration Law Center (NILC) and the Inland Coalition for Immigrant Justice (ICIJ), were differently positioned in terms of mission, size and culture, and each found their own paths to trying new things. Whereas NILC had a development team in place and data and communications infrastructure, ICIJ drew on the ideas of diverse non-development staff and voices from the community for a more grassroots approach, including GoFundMe campaigns for individuals held in detention. Despite their different paths, both took an experimental stance, learned from what they tried, and responded nimbly to iterate and innovate. As a result, both elevated their advocacy voice while engaging the hearts and minds—not only the monetary contributions—of an expanded base of stakeholders. As Marielena Hincapié (then-executive



director of NILC) remarked at the time, “We were grateful for the donations, but we wanted to engage these people as participants in our democracy.”

Another vein of experimentation is focused on incubating new approaches. To this end, Progressive Multiplier (PM) provides initial investment to test an idea and, if it succeeds, to grow it and ultimately build revenue generation R&D into organizations’ budgets. The following are three examples of how PM has supported groups to accelerate their fundraising:

- Alabama Forward, which champions progressive policy and civic engagement, has been monetizing its Shake the Field campaign by developing it first as an online community and lifestyle brand (with its own apparel and other swag) and now with an album and local music festival.
- Texas After Violence Project has piloted a series of online trainings that, while not initially conceived as a revenue generation strategy, are showing signs of success on that front, while engaging advocates, activists, attorneys, social workers, and others interested in ending cycles of violence and trauma.
- It Starts Today Missouri has tested and developed a crowdfunding approach that enables public financing of Democratic candidates through a low-cost monthly subscription model.

Not all innovation is rooted in digital approaches. Based on research by Campbell & Company, with advisory support from a national task force of LGBTQ+ movement leaders, planned giving was identified as a significant opportunity to bring unprecedented revenue to the movement. Research found that the aging Stonewall generation tends to be passionate about equality and civil rights, concerned about recent surges in violence against the community, and more deeply identified with the LGBTQ+ movement than other generations. They also are less likely to have children, and data shows they are more likely to bequeath assets. Informed by this data, the Horizon Foundation’s Now and Forever Campaign has secured over \$100 million in future legacy gifts supporting the LGBTQ community, with the goal of reaching \$250 million by 2025.^{xvii} Planned giving is clearly not suitable for all contexts, but Now and Forever is an example of how tailoring an experiment based on data can engage individuals and bring in significant support for a movement’s future work.

In sum, the past several years have seen a surge in creativity and experimentation in fundraising for social justice with promising results. Looking forward, much more progress could be made if organizations could allocate dedicated budgets to this work over multiple years. Another priority: continuing this work in the spirit of true experimentation and “failing forward”—learning and sharing what works, and what doesn’t, and taking those lessons into the next iteration of work.



SECTION III. QUESTIONS FOR THE PATH FORWARD



Research and interviews for this paper surfaced shared optimism about the capacity of organizations and movements to find the independent revenues they need to advance their missions and visions. Interviewees also lifted up possible next steps in this work, as well as open questions about the path forward. This final section of the paper presents some of these questions as an opportunity for organization and movement leaders, philanthropic partners, intermediaries, consultants and others to advance the conversation among peers and across their fields.



■ Given that every organization has different needs, what will it take to support organizations and movements to experiment with and adopt promising resource generation solutions?

Resource generation solutions have to be driven by the interests and priorities of movement leaders and organizations. Interviews for this paper uncovered a fairly consistent understanding of the most promising types of interventions and supports. The challenge is how to support more organizations to experiment with the best solutions for them, and then to *scale and sustain* such investments so they are not one-offs. Now is the moment for funders, practitioners, and organizational and movement leaders to explore together what will work best in different contexts and for different groups.

■ How can we tap the expertise already available in our movements?

Vivian Chang, executive director of the Democratizing Philanthropy Project and a longtime organizer, points out that there is an identifiable group of people—a “brain trust,” for lack of another name—whose collective knowledge and experience about fundraising and independent revenue can help power change. Members of this group, many of whom we interviewed for this paper, are extraordinary, yet under-appreciated, assets to our movements. At the same time, many practitioners have successful strategies that others don’t know about, along with lessons from other strategies that did not work. Yet, these people have not been tapped for collective learning. The possibility of grounding resource generation strategies in the collective wisdom of practitioners could be a powerful means for inspiring others on their journeys, and for informing more strategic and broad-based strategies.

■ How could we collectively raise resources?

During interviews for this paper, leaders were interested in exploring what might be possible with more collective forms of fundraising. At the same time, some people lifted up dilemmas related to joint efforts. For example, they observed that donors may give to the Sierra Club rather than supporting a collaborative of smaller groups working to advance an ambitious vision for environmental justice because they do not see those organizations as being large or consequential enough to move these issues. This prompts questions such as: How can ecosystems of groups position themselves for mid-level and major donors? Could donor networks (such as Solidaire, Resource Generation, Donors of Color Network, and others) play a stronger role in connecting with and supporting movement ecosystems? And, more broadly, how can networks of organizations attract resources in ways that single organizations could not?

■ How might intermediaries respond better to the resource generation needs of movements?

Given how communications, fundraising, and organizing are so intertwined in today’s movement nonprofits, how do consultants reflect this integration in their work? For example, rather than bringing in a fundraising specialist at the end of a planning process, what might be possible if resource generation needs and opportunities were considered much more frequently from the outset of a program or initiative? And, how might other consulting practices and expertise need to shift to integrate resource generation?



■ How can foundations change their mindsets and approaches when it comes to supporting nonprofits and movements to generate more flexible resources?

The Bridgespan Group has documented a steep rise in collaborative funds through which foundations and donors pool resources for social change and deploy them to nonprofit groups.^{xviii} This has been good news for movement organizations because these funds “tilt toward equity and justice, field- and movement-building, and leaders of color.” What might be possible if funders also set their sights on strategies and risk capital needed for resource generation *beyond* philanthropic funding? And what about providing more long-term funding for this work? For example, what might be possible if a foundation, or group of foundations and donors, invested in the resource generation capacity of a movement or ecosystem of organizations over five to seven years?

■ Are we thinking big enough?

Tori O’Neal, a veteran fundraiser for Community Action, Planned Parenthood, Demos and the NAACP, among others, poses the question of how to lift our sights for what is possible. “Our democracy is under threat. We have to build lasting power with those who have been denied it, and we can’t do that by working and raising money from inside our issue siloes. How do we operate and think bigger?”

Eric Shih of Amalgamated Foundation is exploring what is needed for the longer arc of power building; specifically, he asks what it would take to create more permanent field infrastructure for resource generation. Eric observes that our work today is generational and requires a longer time horizon:

“What we are building today is for today’s fights. But what if we thought about building independent revenue infrastructure for the next generation? What do we need to build that which will outlast us?”



QUESTIONS FOR READERS

This paper begins to form a picture of what it will take to develop and sustain the capacity of social change organizations and movements to engage individuals, generate independent revenue, and thrive. It is meant to be a starting place.

What resonates with you about how this paper presents the challenges and opportunities before us?

What did it get right? What did it get wrong? What is missing?

What would you add to this landscape?

What are your ideas for bolstering resource generation for the organizations and ecosystems you work with?

Ultimately, the next steps in this work must be identified and shared in partnership. Our hope is that this paper lays the groundwork for conversation, answers, and coordinated action among practitioners, funders, and capacity builders. We are honored to be with you on this journey.

We would like to acknowledge the support of the LeadersTrust staff, with special thanks to Maria Rogers Pascual, Holly Delany Cole, and Sydney Hargro. We also offer thanks to the Irvine Foundation, especially Andre Oliver, who provided helpful guidance. We are deeply appreciative of Vivian Chang's wisdom and encouragement. And, above all, we are grateful to the leaders who gave their valuable time for informing this report. They are listed in the first appendix that follows.

APPENDIX A

List of Interviewees

January to April 2024

We are deeply grateful to the many leaders with decades of experience in this important work who shared their reflections.

1. **Deborah Barron**, Executive Director, NLA (New Left Accelerator)
2. **Jeanne Bell**, Consultant (UnderDeveloped and Fundraising Bright Spots author)
3. **Robert Bray**, former Communications Director, NEO Philanthropy (Lightning in a Bottle co-author)
4. **Cynthia Buiza**, Consultant, former Executive Director, CIPC
5. **Vivian Chang**, Executive Director, Democratizing Philanthropy Project
6. **Masha Chernyak**, Consultant (and former director, Latino Nonprofit Accelerator, Latino Community Foundation)
7. **Diana Colin**, Director and Lauren Uy, Program Manager, PIVOT (Powerful Innovations for Voter Organizing and Transformation), California Community Foundation
8. **Adela de la Torre**, Deputy Director, Justice Action Center (Lightning in a Bottle author)
9. **Donna Dubinsky**, co-founder, Lemala Fund
10. **Aaron Eske**, Executive Communications Lead, Stanford Business School (consultant to M3 Initiative)
11. **Marjorie Fine**, Grassroots Fundraising Consultant and Trainer (Lightning in a Bottle co-author)
12. **Cynthia Gibson**, founder and principal, Cynthesis Consulting
13. **Darlene Nipper**, Chief Executive Officer, Rockwood Leadership Institute
14. **C. Nathan Harris**, Director of Community Philanthropy, Oregon Food Bank
15. **Kim Klein and Stephanie Roth**, Klein Roth Consulting
16. **Stacy Kono**, Executive Director, Hand in Hand
17. **Steve Lew**, Project Director, CompassPoint
18. **Erica Lomeli**, Interim Executive Director, UFW Foundation
19. **Bethany Maki**, Executive Director, Progressive Multiplier
20. **Michelle Muri**, Co-founder, Community Centric Fundraising
21. **Linda Nguyen**, Executive Director and founder, Movement Talent
22. **Tori O'Neal**, Strategy, Communications and Development Consultant (formerly Planned Parenthood, Community Change, Demos, NAACP)
23. **Phil Radford**, Chief Strategy Officer, Sierra Club (and founder of Progressive Multiplier)
24. **Beth Rayfield**, Director of Institutional Advancement, Rockwood Leadership Institute
25. **Maria Rogers Pascual**, Program Director, The LeadersTrust
26. **Angelica Salas**, Executive Director, CHIRLA
27. **Eric Shih**, Amalgamated Foundation
28. **Alexandra Suh**, Executive Director, KIWA
29. **Alex Tom**, Executive Director, Center for Empowered Politics
30. **Jen Wei**, Organizational Effectiveness Officer, and **Jehan Velji**, Director, Effective Philanthropy Group, William and Flora Hewlett Foundation
31. **Jasmine Williams**, Associate Director, Dignity in Schools Campaign (former development director, Black Organizing Project)

APPENDIX B

Literature Review Resources - List

Summary profiles of **foundational resources**:

1. Bell, Jeanne and Corenelius, Marla. *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising*. CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2013.
2. Bell, Jeanne and Klein, Kim. *Fundraising Bright Spots: Strategies and Inspiration from Social Change Organizations Raising Money from Individual Donors*. CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2016.
3. de la Torre, Adela. *Lightning in a Bottle: Building Lasting Growth from Viral Moments*. Justice Action Center, 2017.
4. In “I’m Not Asking for Me,” a brief video created by Evelyn and Walter Haas, Jr. Fund in 2015.

Summary profiles of **additional resources** include:

5. Gibson, Cynthia. *Beyond Fundraising: What Does it Mean to Build a Culture of Philanthropy?* Evelyn and Walter Haas, Jr. Fund, 2016.
6. Rayfield, Beth. “If You Build It, They Will Come: Creating a Culture of Fundraising.” *NPQ*, July 20, 2020.
7. McKee, Alia and Rovner, Mark. *Inside Out Fundraising: How to Create a Culture of Philanthropy by Treating Systems Instead of Symptoms*. Sea Change Strategies, 2017.
8. Bartczak, Lori. “Strengthening Fundraising Capacity: How the Evelyn & Walter Haas, Jr. Fund is Supporting Innovation.” *GrantCraft* (Foundation Center, now Candid), 2018.
9. Notes on Community Centered Fundraising
10. Notes on Experiments in Building Fundraising Capacity

Literature Review - Summary Profiles

Foundational resources:

1. ***UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising.*** Jeanne Bell and Marla Corenelius, CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2013

In 2013, this benchmark study dug deeper into what many assumed was a crisis of development director turnover and found that **while there were some very real challenges in recruiting and retaining fund development professionals, the problem facing nonprofit fundraising was more complex.** Based on more than 2,700 interviews and 11 focus groups with executive directors, development directors, and board members, the study found that **success in fundraising is not dependent on one person or position alone—it hinges on the presence of a development director supported by a “culture of philanthropy” in the organization,** elements of which they identify as including:

- An executive director committed to and personally involved in fundraising;
- Fund development considered a mission-aligned program of the organization;
- Most people in the organization (across positions) engaged in relationship-building;
- Everyone promoting philanthropy and able to articulate a case for giving; and
- Organizational systems in place to support this work.

While many had observed a “revolving door” of development director turnover and vacancies, **few up until this point had made the connection with what the study describes as a “vicious cycle,”** wherein the lack of conditions for success result in premature departure of development directors, creating lack of consistency in the organization’s development function, which in turn contributes to the inability to create the conditions of success—and so to be repeated again.

To interrupt this cycle, the study says, would require **“a profoundly different stance towards fundraising.”** Calls to action include recommendations to:

- Shift negative mindsets about fundraising, both within organizations and sector-wide;
- Set realistic goals and share accountability more broadly across the organization;
- Invest in and level up the talent pool of fundraising professionals;
- Engage funders in supporting grantee fundraising capacity and innovations; and
- Exercise “fundraising leadership,” among both development directors and executive leaders, to respectively help shape and drive an organizational culture of philanthropy.

“ I think many of us are focused on emerging leaders for our own positions, but I don’t think we’re doing that in the development world.

— Executive Director

Specific Challenges Cited:

- As many as 25% of organizations in the study had no fundraising plan;
- 20% had no donor database;
- Two-thirds of executive directors said their boards were not doing enough;
- More than 25% of executives said they themselves lacked competency in fundraising; and
- Most development directors said they had little or only moderate influence on budgets or getting staff involved in fundraising.

2. Fundraising Bright Spots: Strategies and Inspiration from Social Change Organizations Raising Money from Individual Donors. Jeanne Bell and Kim Klein, CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2016

Focusing on what's working in nonprofit fundraising (not to enable replication of tactics but learnings about the organizational cultures that support success), this report culls lessons from 16 progressive organizations that have built strong individual giving programs even with small staffs and limited budgets. Several are **social justice movement-building organizations that are approaching engagement holistically**, integrating fund development with strategies like issue education and political action, and making little or no distinction between donors and members. This paper is informed by a three-year review of their fundraising performance and interviews with staff, board, and donor-members.

The authors identify four commonalities across the organizations studied (each supported by a series of related mindsets):

1. Fundraising is core to the organization's identity;
2. Fundraising is distributed broadly across staff, board, and volunteers;
3. Fundraising succeeds because of authentic relationships with donors; and
4. Fundraising is characterized by persistence, discipline, and intentionality.

Fundraising and organizational identity means the decision to raise money from individuals is based on organizational values and that organizing, building a membership, and fundraising are part of a cohesive whole—not distinct endeavors.

“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... that is the exact same way we want to work with our donors.”
— Rob Gitin, Executive Director, At The Crossroads

Distributing fundraising broadly puts development directors (if there even is such a position) in a leadership and support role of providing systems and supports to make fundraising something that anyone in the organization can engage—and be successful—in.

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

Authentic relationships include — but are not limited to — donors. Authentic donor relationships are possible because of strong relationships staff and board members have with one another.

Fundraising discipline entails investing time and intentionality in communication and systems for engagement and in their continuous improvement. Alongside such discipline, the ability to experiment and learn is also key.

3. *Lightning in a Bottle: Building Lasting Growth from Viral Moments.* Adela de la Torre, Justice Action Center, 2017

This paper features case studies of how the National Immigration Law Center (NILC) and the Inland Coalition for Immigrant Justice (ICIJ) were able to capture the momentum of current events and—**through integrating communications, mobilization, and fundraising strategies**—achieve growth in donor support and engagement. For both, the “moments” were precipitated by the 2016 change in administration and enactment of Trump-era anti-immigration policies. While NILC had done significant groundwork and planning prior, positioning it to act quickly to take to the national stage (it took the lead in challenging Trump’s Muslim ban) and engage the community through streamlined communications and calls to action, ICIJ rapidly went from leading a social media campaign to raise bail for two detainees to leveraging a diverse array of online giving channels to scale that community power to free many others.

Common mindsets and management practices that created the conditions for their success included:

- **Integration across functions** – bringing together fundraising, communications, and mobilization strategies (ICIJ participated in the M3 cohort supporting this approach);
- **High level of trust** – mutual trust between leadership and staff enables the confidence to delegate, innovate, and experiment; and
- **Culture of curiosity** – willingness and creativity to try new things.

At NILC, information management also played an important role, as tracking engagement rates on appeals across platforms and monitoring progress donor retention goals supported the level of confidence needed to continue and double down on experiments with more streamlined, call-to-action-driven communications.

ICIJ’s commitment to including community voices and offering many ways and mechanisms through which to engage enabled broad participation and a strong sense of shared ownership in its work.

“The successful campaign to free Alex and Wilson showed the Inland Empire community that ICIJ was a force capable of creating real change for immigrants and also helped ICIJ build an approach for continued growth in fundraising and digital engagement.”
— excerpt

4. “I’m Not Asking for Me.” <https://vimeo.com/138687909>

In this brief video created by Evelyn and Walter Haas, Jr. Fund in 2015, several development directors and executive directors share their experiences with fundraising. Their comments illustrate the “vilification” of fundraising, how this impacts the professionals charged with doing it, as well as how it can be turned around by cultivating a culture of philanthropy.

In the first half of the video, numerous leaders describe how traditional fundraising felt like something they “had to do,” created a sense of “pressure,” got “siloes away,” or felt “lonely.” In the second half, they talked about how an approach that does away with the “false dichotomy between social justice and money” and recognizes that “the best fundraisers are (in fact) organizers” made fund development “rewarding,” more “meaningful,” and even “fun.”

“Because the work matters to all of us at the organization, we all have to be involved in the fundraising.”
— Rufaro Gawarda, MIV and Power CA

Additional resources:

5. *Beyond Fundraising: What Does it Mean to Build a Culture of Philanthropy?* Cynthia Gibson, Evelyn and Walter Haas, Jr. Fund, 2016

Dissatisfied with the **lack of a common understanding of the term “culture of philanthropy”** (as noted in *UnderDeveloped*), the Haas, Jr. Fund commissioned an exploration of how such a culture is being practiced across the sector. The hope was that unpacking what it entails could help more organizations develop a culture of philanthropy and make it their own. This research is based on an extensive literature scan, augmented by interviews with 15 field experts.

The paper acknowledges challenges with the terminology itself (language often having different meanings to each of us) and sets the topic of fundraising within a broader context of change in the sector (e.g., emerging technology, generational shifts, etc.). It then defines a culture of philanthropy as “one in which everyone—board, staff, and executive director—has a part to play in raising resources for the organization. It’s about relationships, not just money...as much about keeping donors as acquiring new ones and seeing them as having more than just money to bring to the table. And it’s a culture in which fund development is a valued and mission aligned component of everything the organization does.”

“In the end, staff, boards, volunteers, and constituents of your organization need not take on the role of fundraiser. But fundraising works infinitely better with their involvement and buy-in.”
— Karen Osborne, The Osborne Group (consultants)

This definition includes four components:

1. Shared responsibility for development (fundraising isn’t just one person’s job)
2. Integration and alignment with mission (it’s valued as more than a standalone function)
3. A focus on fundraising as engagement (the two are no longer separated or siloed)
4. Strong donor relationships (invite and support donors’ connection to the work)

Building on the concept of strengthening relationships with donors, the conviction that they have more to offer than money, and increased interest in what Millennial donors want, **“donor-centered fundraising” emerged in this research as key to a culture of philanthropy.**²

While several descriptions of donor-centered fundraising take a broad view of what this can look like (talking about “donors and constituents,” for example) or frame fund development as “the means to the end of community change,” others are more direct about prioritizing donors and “supporting [them] in developing their philanthropy.”

“Cookie-cutter notes, tote bags, or ‘fake emergencies,’ Mark Rovner, CEO of Sea Change Strategies, says, won’t work. What will is ‘deeply understanding why the donor supports you and delivering on her (or his) expectations.”
— excerpt

Some have taken exception to the idea of “centering” donor interests in this way. Vu Le, for example, argues that centering anyone with more power, privilege, and wealth is problematic when viewed through an equity lens—that it is, in fact, antithetical to the work of social justice nonprofits, in particular. (See sidebar.)

2. See also, “What Does it Take to Create a Culture of Philanthropy?” by Cynthia Gibson, on the Haas, Jr. Fund Blog <https://www.haasjr.org/perspectives/culture-of-philanthropy>.

This paper features a **case study** of Seattle-based Pride Foundation’s successful shift to a culture of philanthropy. Though it started with donors and a desire to better understand their interests and motivations, it broadened to donors’ extended networks and to resources beyond money.

“*We realized that we had to start providing supporters with tools and guidance they could use to attract others to our work because their efforts can go way beyond what I or my staff or board could do by ourselves.*”

— **Kris Hermanns, Executive Director, Pride Foundation**

Pride Foundation’s journey exemplifies what it looks like to integrate fundraising into a broader engagement strategy. It also **highlights the role of experimentation**. Hermanns cautions that there’s no “cookbook” for this process, and it takes patience, especially on behalf of the board. “It’s going to be trial and error as you learn and adapt,” she says, “but it’s important to take time to consider each dimension of this process as it relates to your organization’s culture, as well as the landscape and context within which you’re working.”

Hermann’s direct involvement speaks to the **importance of leadership** and buy-in from the top. An organization’s success in creating a culture of philanthropy, as noted by Robert Fogal of Fogal Associates, “will depend on the people who are leading it to maintain that culture. It doesn’t just happen.”

6. “If You Build It, They Will Come: Creating a Culture of Fundraising.” Beth Rayfield, *NPQ*, July 20, 2020

This article by organizer and fund development professional Beth Rayfield gives a practitioner’s view of what it takes to build a culture of fundraising (which she uses interchangeably with the term philanthropy). It is based on the belief that **“every organizer is a fundraiser”** and that to embrace this is “crucial to our ability to continue to fund organizing at our social justice nonprofits.” (Originally appearing in 2017 in the *Journal of Grassroots Fundraising*, this article was republished by NPQ with minor updates in 2020.)

The article begins by stating the **importance of not relying only on foundation funding** but diversifying to include a broad range of individuals—including engaging the talents of more people of color in fund development. It makes a case for cultivating a culture of fundraising by naming three benefits: 1) creating a shared set of beliefs, behaviors, and systems that all in the organization participate in and be guided by; 2) broadening and distributing the sense of ownership for the financial health of the organization; and 3) prompting staff to consider fundraising a core competency of their current job and perhaps even a future career choice.

“*Building a culture of fundraising will not only increase access to dollars for organizing, it will also cultivate people of color to become owners of the money in our movements, making fundraising core to the realization of our vision for inclusion and justice.*”

— **excerpt**

This article argues that broadening ownership of fundraising is about mobilizing an existing, but underutilized, resource: “You already have dozens of people who are dedicated to your mission, knowledgeable about your issues, and committed to your organization’s sustainability. **A culture of fundraising simply establishes the shared expectations and systems needed to put these talents to work for fundraising.** Your staff and board are having thousands of conversations about your organization every year. If you could add a fundraising ask to even a fraction of those, you could increase your revenue, donors and reach exponentially without increasing your fundraising costs.”

In noting the challenges or hurdles that often come up for organizations seeking to create a culture of fundraising, the author acknowledges these but emphasizes that **leadership is key** to working through and ultimately overcoming them. She uses Robert Gass' Wheel of Change (Hearts and Minds; Behaviors; Structures) model as a tool for going about this.

Hearts and Minds is about looking within and transforming some of our attitudes and taboos about money—and asking for it from others.

Structures, like creating a fundraising vision, philosophy, and/or theory of change can provide the staff and board with an important tool to overcome some reluctance by seeing that they are not asking for themselves, but something much bigger. Structures also reinforce the norm that this is an expectation to which they will be held accountable.

Finally, the article highlights the importance of regular fundraising training—as well as a lot of persistence—and seeks to break the biases we have about fundraising (and the “us/them” of how we think of donors, nonprofits, and community).

🔥 Fundraising is perceived to be separate from movement building.... It is seen as a necessary evil, a soft skill, a symptom of what is wrong with capitalism and the nonprofit industrial complex. In reality, fundraising IS movement building. It is one of the many ways that we educate, agitate, and organize. Our donors are activists, advocates, and stakeholders. They march with us, pray at our vigils, carry signs at our protests, and yes, they invest in us. Our donors are us and each member of our organizations must engage them in this vital work of social change by seeking their time, talent, AND treasure.

— excerpt

7. Inside Out Fundraising: How to Create a Culture of Philanthropy by Treating Systems Instead of Symptoms. Alia McKee and Mark Rovner, Sea Change Strategies, 2017

This paper continues to build on the literature regarding a culture of philanthropy and seeks to dig deeper into **how culture is created and maintained**. Drawing from a survey of over 300 diverse social sector informants and 15 in-depth interviews, it makes the case that rather than being a tactical problem or lack of knowledge, **fundraising challenges in nonprofits are driven largely by dysfunctions in their internal organizational culture**. Calling out common issues like poor communication, unresolved conflict, and vague goals, the authors encourage that we stop disregarding these as just typical or unavoidable context within which fundraising operates, but instead turn our focus to these conditions as real—and surmountable—obstacles to its success.

Like Rayfield (“If You Build It, They Will Come”), McKee and Rovner draw from Robert Gass' Wheel of Change model to describe the challenges facing organizations in creating a culture of philanthropy — and the levers they can use to make change. These levers (or “points of entry”) include:

- Senior leadership;
- Managing relationships among fundraisers, communications, and program staff;
- Getting the right information;
- Organizational goal-setting; and
- Re-casting the donor as a true partner in the organization's work.

Recognizing that **culture change is complex, takes time, and that there is no easy formula**, the authors suggest a few “experiments” in each of the five areas that can help move organizations closer to where they want to be. These include things like training and coaching; setting clearer expectations and goals (both for individuals and to be held collectively); getting relationships right (both among staff and with donors); and getting a better handle on data with improved information systems and dashboards.

Several of their recommendations echo and/or bring keener focus to those introduced in other studies, such as:

- Building a strong, trusting relationship between an executive director (who is committed to and engaged in fundraising) and their development director;
- Ensuring close connection between communications and development;
- Taking a donor-centric approach to cultivation and retention; and
- Supporting fundraising with disciplined data systems and sensemaking.

One way it stands out is by lifting up the importance of a “healthy overall work culture,” acknowledging the disruption caused by unresolved tension or poorly managed conflict.

8. “Strengthening Fundraising Capacity: How the Evelyn & Walter Haas, Jr. Fund is Supporting Innovation.” Lori Bartczak, *GrantCraft* (Foundation Center, now Candid), 2018

This case study, reviewing several of the above-mentioned efforts and initiatives, reported that in addition to building the fundraising capacity of nonprofit staff and leadership, **there is a need to develop the field of capacity builders themselves**. Noting that the way in which consulting expertise tends to be siloed into specialty areas stymie the integration of these (e.g., strategy, leadership, communications, fund development, etc.) in the provision of capacity building to advance a culture of philanthropy. Additionally, like nonprofit staff, these capacity builders rarely have the time or capacity carved out to learn from and with each other. At the Haas, Jr. Fund, early work in this area has included formal convenings of capacity builders as well as informal network-weaving.

9. Notes on Community Centric Fundraising

In a 2015 blog (<https://nonprofitaf.com/2015/04/winter-is-coming-and-the-donor-centric-fundraising-model-must-evolve/>), nonprofit blogger and former executive director Vu Le critiqued the donor-centric fundraising model as unnecessarily coddling donors, reinforcing inequities, and deprioritizing community interests. In a 2017 follow-up (<https://nonprofitaf.com/2017/05/how-donor-centrism-perpetuates-inequity-and-why-we-must-move-toward-community-centric-fundraising/>, updated in 2020), he says the model has already become “pervasive” in the sector and while he agrees with efforts to treat donors more like humans than bank accounts, many fundraisers go too far in lionizing the role of donors in nonprofit work.

“I believe in many of the tenets of donor-centrism — don’t treat donors like ATMs, appreciate every gift of any amount, don’t take donors for granted, build relationships, be transparent, etc. I just don’t believe that donors should be in the center of nonprofit work, or even the center of fundraising work.... There is so much language now about treating donors like ‘heroes’ or even ‘superheroes.’”

Le points to a missed opportunity to take donor relationships even deeper, to what may even be an uncomfortable place: “To constantly put donors in the center and appeal to their emotion and ego means there is less time and energy devoted to helping our donors understand and navigate the systemic injustice that they may be inadvertently contributing to.” In an August 2023 interview for Community-Centric Fundraising (<https://communitycentricfundraising.org/2023/08/23/beyond-philanthropy-disrupting-through-organizing-bringafoldingchair/>), he speaks even more broadly of the need to question the very roots of fundraising and all of the effort nonprofits must put toward it, musing: “You know...the solution that many of us have been proposing is like, I don’t know, just pay your taxes. Have rich, wealthy people pay their fair share of taxes, government takes care of its people, and then maybe we could just go off and become wedding singers or whatever it is that we dream about doing.”

His critiques aren’t limited to donors, noting that nonprofits themselves should be in the business of questioning their motivations behind fundraising and if their organization really should be getting X resources — or sharing them: “We’ve had organizations helping other organizations write grant proposals...that’s what it means to be community centric. We’ve got to start thinking about the whole community, not just the survival of our own missions.”

“ They [donors] cannot be in the center. None of us can be in the center, for all the above and other reasons. The community we serve and benefit from must be in the center.

Community Centric Fundraising champions 10 Principles (<https://communitycentricfundraising.org/ccf-principles/>) is a “starting point” for what this could look like in the field.

10. Notes on Experiments in Building Fundraising Capacity

- **M3 Initiative** (Money/Message/Mobilize) supported a cohort of eight immigrant rights groups in integrating their fundraising, communications, and organizing. This initiative (active in 2018-20 and supported by lead organizational partner National Immigration Law Center) made it possible for the groups to work with a national communications consulting firm (M+R) to develop social media strategies, build relationships with media and other influencers, and hone their storytelling skills. As a result, organizations gained media visibility, grew their donor bases, and brought new supporters to the fight for immigrant justice. Participating organizations were able to build on their existing organizing skills to attract other kinds of (i.e., donor) support and benefited from the cohort model that gave them peers to learn with and from.

One lesson from the M3 initiative was that several of the participating groups did not have the staff capacity needed to invest in and sustain these complex communications efforts. In the second year of the cohort, three were able to obtain additional assistance through the **Kairos Digital Organizing Fellowship**, which recruited, selected, trained and placed emerging talent at each organization to work for nine months supporting their mobilizing, fundraising and communications priorities.

- **Raising the States** deeply engaged eight organizations in the LGBTQIA ecosystem in a cohort approach similar to M3 (it was originally called M3, then rebranded to suit its own focus). Working with two consultants (PowerLabs and Network for Good), participants brought together fundraising, communications, and program staff to develop integrated strategies creating a ladder of engagement for supporters. Trainings were also developed and made available to all 43 member organizations of Equality Federation Institute (EFI), the lead partner in this initiative.

The foundation-supported (Haas, Jr. Fund) cohort approach of both **M3 and Raising the States** brought consulting expertise to movement groups that could not have afforded to do so, each on their own. Most importantly, it brought groups together to learn with, and from, each other in a way they rarely get the opportunity to.

“ I see the integration of these things [money, mobilize, message], more clearly than I ever have in terms of our work. We are starting to get into a good rhythm of how we integrate fundraising with social media and messaging and how we connect online action to offline action and fundraising.

— Chris Mueller, PICO-CA

- **The Lemala Fund** provides significant, multi-year support (\$300,000 over three years, with peer learning opportunities as part of a cohort) to Fund-identified grantee partners (no unsolicited requests) that enables them to experiment with and build new approaches to fundraising and revenue generation. Having supported a total of 14 groups in three cohorts between 2020 and 2022, Lemala’s investment has strengthened the capacity of fundraising teams and resulted in fund development gains.
- **Progressive Multiplier** was formed by former Greenpeace USA CEO Phil Radford and others to build the capacity of small, progressive organizations to diversify their funding sources beyond institutional philanthropy. One of its core activities is to provide loans enabling organizations to experiment and ultimately scale strategies to raise what it calls “independent revenue,” with a special eye toward groups with both c3s and c4s and how to generate revenue across those entities. Progressive Multiplier began with a funder-sponsored cohort model and has since expanded to new initiatives, including making grants directly to groups seeking support. In October 2023, it was engaged by the Ford Foundation to lead a community of practice for its BUILD grantees.
- **Rockwood Resource Leaders Fellowship**, piloted in 2019, provides support to development professionals as organizational leaders, strategists, and agents of change. Recognizing that the development position is often isolating, the fellowship nurtures individual leadership skills and provides a learning community of peers. The pilot cohort of 24 fellows (selected from a pool of over 100 nominees) participated in two five-day residential retreats, peer coaching sessions, and webinars on emergent topics in fundraising. The program aligns with recommendations from previous literature, including the role of development directors in catalyzing and coaching others throughout their organizations to engage in fundraising. It is also built around Rockwood’s core leadership model and requires that participants’ executive directors have been Rockwood-trained themselves, ensuring that participants would return to a team aligned behind the same values and principles. One of the characteristics of this program that stuck with participants was that it centered their own values:

“ Conferences like AFP (Association of Fundraising Professionals) offer important technical skills-building, but they kind of assume we can do this work anywhere...that fundraising is transferable. But for us, we are purposefully in these movements and that drives how we approach fundraising.

— Saurabh Bajaj, Chief Development Officer, National LGBTQ Task Force

“ I [remember thinking], I am getting ready to think about myself for a week. This is going to be a brain change.... We were flipping it; fundraising is all about organizational and donor vision. It was really moving to me throughout the week to see that our vision [as resource leaders] is something that really matters.

— Susan Rightsell, Deputy Director of Institutional Advancement, Community Change

- **Resource Mobilizers Collaborative** is a partnership between Justice Funders, CompassPoint, and Wealth Reclamation Academy of Practitioners, each of which is engaged in initiatives to build the fundraising capacity of social justice and movement organizations. Formed in 2019, the collaborative envisions a reframing of fund development as “resource development” and seeks to center the values of equity, justice, and community power by shifting from transactional to transformational resource relationships.

ENDNOTES

- i. *Assessment of Inclusion, Diversity, Equity & Access For Fundraising Professionals*, Association of Fundraising Professionals, 2021. Also: *Money, Power and Race: The Lived Experience of Fundraisers of Color*, Cause Effective, 2019.
- ii. Community Centric Fundraising website and guiding principles <https://communitycentricfundraising.org/ccf-principles/>
- iii. *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising*, by Jeanne Bell and Marla Cornelius. CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2013.
- iv. *Beyond Fundraising: What Does it Mean to Build a Culture of Philanthropy?* by Cynthia Gibson. Evelyn and Walter Haas, Jr. Fund, 2016.
- v. Several sources in the Literature Review (Appendix B) speak to creating a culture of philanthropy. See Gibson (2016), Rayfield (2020), and McKee and Rovner (2017).
- vi. See video “I’m Not Asking for Me” (Evelyn and Walter Haas, Jr. Fund, 2015), which captures how the “vilification” of fundraising impacts the professionals charged with doing it and how this might be turned around by cultivating a culture of philanthropy.
- vii. Resource Mobilizers Collaborative is a partnership between Justice Funders, CompassPoint, and Wealth Reclamation Academy of Practitioners, to build the fundraising capacity of social justice and movement organizations while reframing fund development as resource development, centering the values of equity, justice, and community power. Quote source: <https://www.compasspoint.org/workshop/From%20Fundraiser%20to%20Resource%20Mobilizer%3A%20Ch>
- viii. “Kill Your Gala: Why Galas Hinder Fundraising Growth at Small/Medium Nonprofits,” Armando Zumaya, LinkedIn, 2024. <https://www.linkedin.com/pulse/kill-your-gala-why-galas-hinder-fundraising-growth-armando-zumaya-e4ehc/>
- ix. “Get That Money: A Conversation with Rhea Wong,” by Isaiah Thompson and Rhea Wong. *Nonprofit Quarterly*, June 5, 2023.
- x. *Fundraising Bright Spots: Strategies and Inspiration from Social Change Organizations Raising Money from Individual Donors*, by Jeanne Bell and Kim Klein. CompassPoint & Evelyn and Walter Haas, Jr. Fund, 2016.
- xi. Oregon Food Bank website <https://www.oregonfoodbank.org/how-do-you-measure-a-year-what-about-love>
- xii. *Advancing Work Rights In California: Where We Began, What We Learned, Where We’re Going*, The Fair Work Initiative, James Irvine Foundation, June 2023; and *Internal Strategy Memo: Organizational and Collective Capacity* (early and in-process findings).
- xiii. *Lightning in a Bottle: Building Lasting Growth from Viral Moments*, by Adela de la Torre, 2017.
- xiv. The Lemala Fund Preliminary Evaluation Findings, Kris Helé Consulting, 2023.
- xv. Excerpt from Evelyn and Walter Haas, Jr. Fund reflection document (internal, not for distribution)
- xvi. *The Missing Middle: Part III, A Snapshot of Middle Donor Fundraising*, by Alia McKee and Mark Rovner. Sea Change Strategies, 2021. <https://www.seachangestrategies.com/wp-content/uploads/2021/09/Sea-Change-Strategies-Missing-Middle-Part-III.pdf>
- xvii. *National Task Force on LGBTQ Planned Giving: Project Report and National Strategy*, by Sarah Anderson, Kate Roosevelt and Bill Zook, Campbell & Company, March 2018; and Horizon Foundation website <https://www.horizonsfoundation.org/ways-to-give/legacy/>.
- xviii. *The Philanthropic Collaborative Landscape*, by Alison Powell, Wendy Castillo, and Simon Morfit, The Bridgespan Group, September 2023. <https://www.bridgespan.org/getmedia/e732c968-91ea-4336-8f61-9c33e5a0ddbc/philanthropic-collaborative-landscape.pdf>