



**Calsac**

CALIFORNIA  
SCHOOL-AGE  
CONSORTIUM

**Tapping Into the Incredible  
Potential of Giving**

Ruth Obel-Jorgensen  
Calsac Executive Director

NAA Convention | March 17, 2019



# About CalSAC



# Introductions



**Ruth Obel-Jorgensen**  
*Executive Director*  
California School-Age  
Consortium (CaSAC)

*“When you get, give.  
When you learn, teach”*  
- Maya Angelou



# Introductions



## Pair/Share

- What resonates most with you about the statements below?

- 1) Fundraising is a form of organizing and power-building, not merely a strategy for financing my organization's work.
- 2) Fundraising at my organization is distributed broadly across staff, board and volunteers; It's not contained in a single department or to a single team.
- 3) Fundraising at my organization is build on authentic relationships with donors, not transactional interactions.
- 4) I'm nervous about how to begin or support individual fundraisings at my organization.
- 5) I'm comfortable asking people to donate (their money).

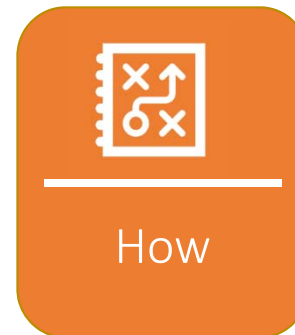
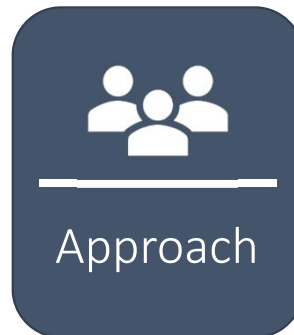
# Session Overview

## Tapping Into the Incredible Potential of Giving

### Objectives

Explore our relationship to money and power.

Gain strategies and tools to start or expand an individual giving program.





Fundraising Bright Spots:  
Strategies and Inspiration from  
Social Change Organizations  
Raising Money From Individual  
Donors

<https://www.compasspoint.org/sites/default/files/documents/BrightSpots.pdf>

# Context

## Core Components

- Fundraising is core to the organization's Identity
- Fundraising is distributed broadly across staff, board and volunteers
- Fundraising succeeds because of authentic relationships with donors
- Fundraising is characterized by persistence, discipline and intentionality





## Underdeveloped: A National Study of Challenges Facing Nonprofit Fundraising

[https://www.haasjr.org/sites/default/files/resources/UnderDeveloped\\_Co\\_mpassPoint\\_HaasJrFund\\_January%202013\\_0.pdf](https://www.haasjr.org/sites/default/files/resources/UnderDeveloped_Co_mpassPoint_HaasJrFund_January%202013_0.pdf)

## Beyond fundraising: What Does It Mean to Build a Culture of Philanthropy?

[https://www.haasjr.org/sites/default/files/resources/Haas\\_CultureofPhilanthropy\\_F1\\_0.pdf](https://www.haasjr.org/sites/default/files/resources/Haas_CultureofPhilanthropy_F1_0.pdf)

# Context

- Active participation of board members in fundraising
  - 20% of boards are engaged in fundraising
- Grow the development pipeline
  - Limited and shrinking supply of qualified candidates for development positions at small to medium-sized nonprofits
- Diversify development
  - Development directors (88% white) and executive directors (83% white)





**Core Component #1:**  
Fundraising is core to  
the organization's  
identity

Fundraising Bright Spots:  
Strategies and Inspiration  
from Social Change  
Organizations Raising Money  
From Individual Donors  
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# Hallmarks of Philanthropy



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





## Core Component #2:

Fundraising is distributed broadly across staff, board and volunteers

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# Hallmarks of Philanthropy



- Fundraising is not the purview of a select group of professionals – it’s a process that anyone can engage in.
- The conversation about fundraising goals and progress belongs everywhere. It’s not contained in a single department or to a single team.
- Development directors are organizational leaders focused on skills building, culture change, and systems development to support others in fundraising.



**Core Component #3:**  
Fundraising succeeds  
because of authentic  
relationships with  
donors

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## Hallmarks of Philanthropy



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



**Core Component #4:**  
Fundraising is characterized by persistence, discipline and intentionality

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## Hallmarks of Philanthropy



- More important than having a perfect system is working whatever system with rigor and continuous improvement.
- Development and communications are inextricably linked.
- The use of data is not just about having a donor database. It's also about getting feedback and surveying all fundraising activities.



Paying forward a brighter future for the next generation while building the capacity of individuals, the sustainability of organizations, and the durability of the field.





**Paying forward a brighter future for the next generation** while building the capacity of individuals, the sustainability of organizations, and the durability of the field.

## Our Approach

### A Culture of Philanthropy

- Believe that anyone can and should be a donor.
- Create opportunity for every person to contribute to and take ownership for the things that are most important to them – to feel their power to make change.
- Opportunity to diversify executive leadership and boards by engaging emerging leaders in giving – building transferable skills and transformational experiences.





“I am here and so are you. And we matter. We can change things.”

- Ella Baker, Civil rights and human rights activist

## Our Approach

Exploring Our Relationship with Money & Power

- Reflection
- Discussion





“Mission-driven fundraising is tough and it isn’t necessarily driven by the goal to raise the most money. It’s driven by the goal to change the world.”

- Beth Rayfield, Coalition for Humane Immigrant Rights of Los Angeles

## Our Approach

- All staff and board participate in fundraising, including direct asks for donation
- Development strategy informed by the full staff team and board
- Fundraising is largely done through existing programs and with constituents
- Space for reflection on money and power, mindset
- Trial and error, willing to explore new ideas and shift
- Shared success and celebration





“Never doubt that a small group of thoughtful and dedicated people can change the world”

- Margaret Meade

## Our Approach

- Development staff values and respects program staff experience and perspective
- Development staff observed and learned from how program team operated
- Development staff participates in staff meetings and retreats
- Weekly supervision with Dev Director/Exec Director; discuss strategy, relationships, power/privilege
- Development staff trains and supports staff, board and constituents







## Campaigns

“Fundraising is the gentle art of teaching the joy of giving.”

- Hank Rosso, Author and fundraising mentor

# Our Approach



|  |  |   |   |
|--|--|---|---|
| <p><b>Community</b></p> <p>10% of proceeds towards OST programs affected by the 2017 California fires</p> <p><b>\$10,000</b></p> | <p><b>Caring</b></p> <p>Random acts of kindness</p> <p><b>\$20,000</b></p> | <p><b>Craziness</b></p> <p>CalSAC Staff get slimed</p> <p><b>\$27,500</b></p> | <p><b>Courage</b></p> <p>Ruth goes skydiving</p> <p><b>\$35,000</b></p> |
|--|--|---|---|

#GIVINGTUESDAY™



## Giving Ambassadors & Giving Alliance

“I want this work to never end. I want what CalSAC does to reach as many people as possible. I know that by giving and imploring others to give it will continue...”

- LaTricia Scott, Donor & Constituent

# Our Approach





Putting the FUN in fundraising!

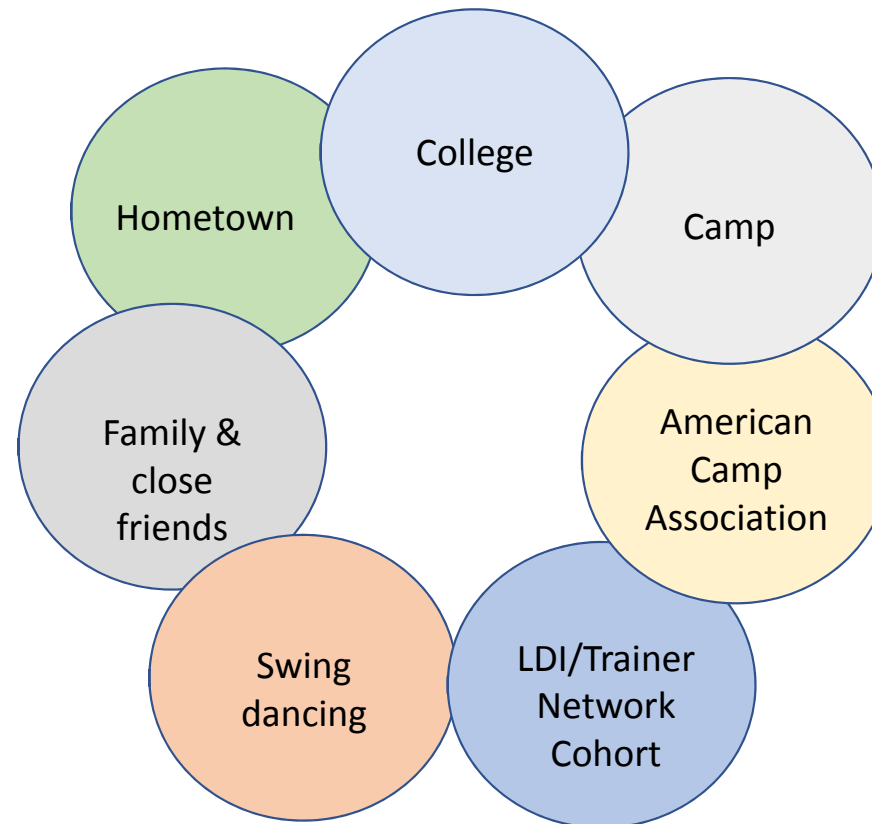




## Step 1: Identify Your Spheres of Influence

- Where did you go to school?
- Where have you worked?
- What hobbies do you have or have you had?
- Where do you volunteer?
- What groups are you part of because of your child(ren)?
- Who do you hang out with on the weekends?

# Simple Tools: Spheres



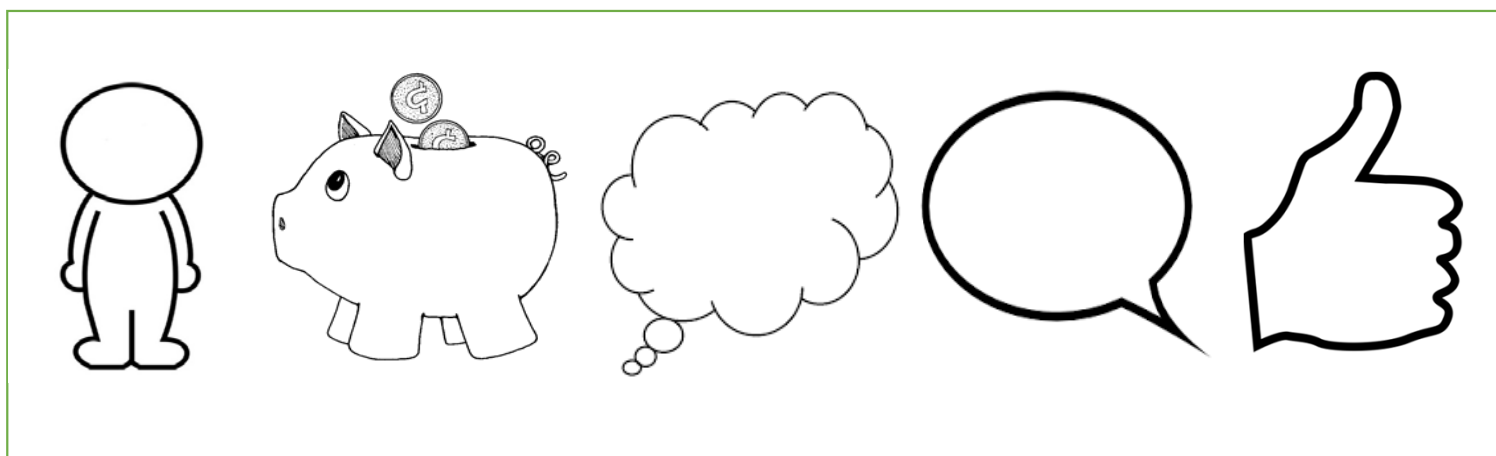


# Fun Tools: Pictospecting



## Step 2: Determine Prospects

- Who will you ask?
- How much?
- I'm asking this person because \_\_\_\_\_
- I'm excited to share \_\_\_\_\_ with them about why I care about this cause
- I think they will give because \_\_\_\_\_



# Friendly Tools: Plan



## Step 3: Set Your Goal

- Add each individual to a donor invite list
- Identify people who is more likely to give
- Set your fundraising goal by adding the likely and most likely donors
- Set a stretch goal that is a little beyond your anticipated donations

## Step 4: Create a Plan

- How/when will you ask?
- How much will you raise through each activity?



## My Fundraising Plan

Name: \_\_\_\_\_  
Individual Goal: \_\_\_\_\_

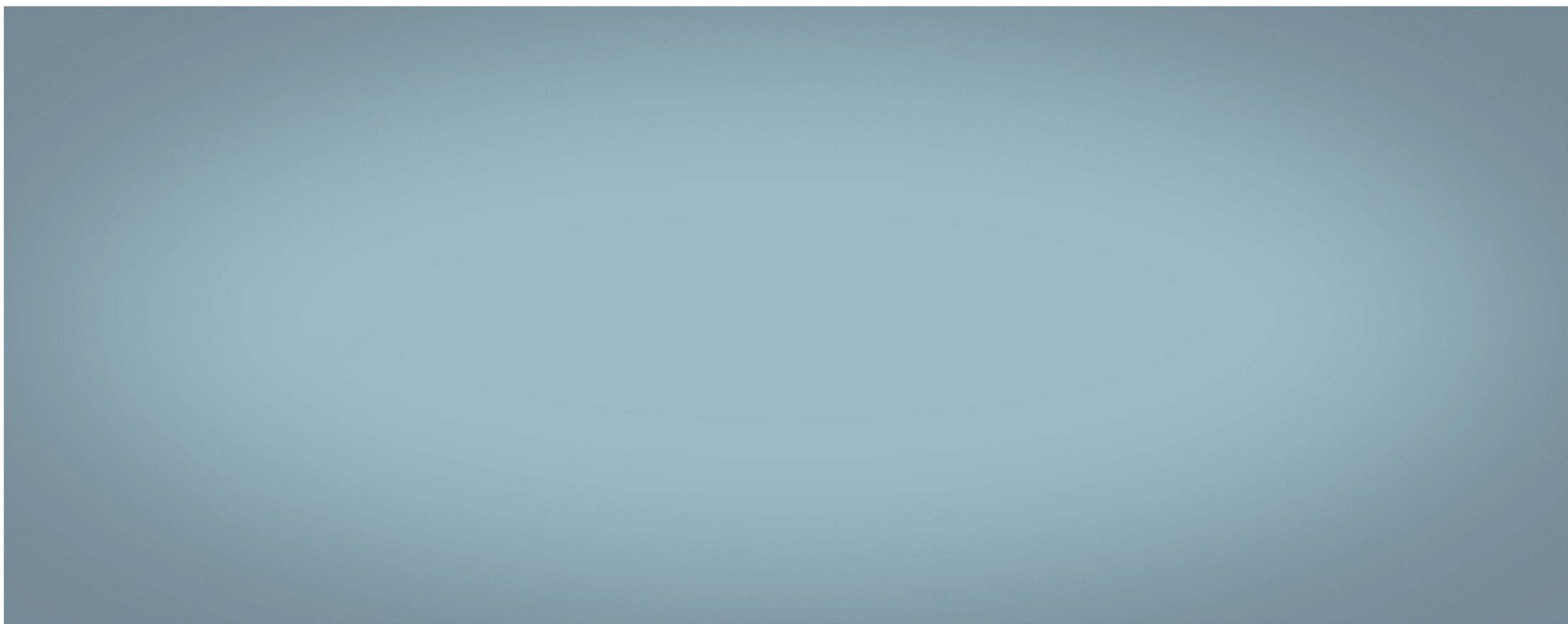
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**Q1**  
(Jan-March)

**Q2**  
(April-June)

| Activity | Amount Raised | Activity | Amount Raised |
|----------|---------------|----------|---------------|
| 1)       | \$            | 1)       | \$            |
| 2)       | \$            | 2)       | \$            |
| 3)       | \$            | 3)       | \$            |
| 4)       | \$            | 4)       | \$            |
| 5)       | \$            | 5)       | \$            |

I'M NOT ASKING FOR ME...



# Evaluations







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