BLACK FOX PHILANTHROPY LLC

Certified B Corporation

FUNDRAISING HANDBOOK

BLACK FOX PHILANTHROPY HELPS BRIDGE THE GAP BETWEEN THE REALITY OF TODAY AND THE PROMISE OF TOMORROW

WHO WE ARE

Black Fox Philanthropy is a leading fundraising firm serving international NGOs and domestic nonprofits. As a B Corp social enterprise, our mission is to help worthy organizations attract significant and sustainable funding so they can effect deep and lasting social change. Profits are wholly reinvested in the company's long-term contribution to the social sector.

Black Fox Philanthropy is as fiercely committed to our clients' missions as they are. From limited engagements to year-long contracts, we partner with clients to provide effective fundraising strategies and services, and when optimal, serve as a short-term extension of their staff. With impact as our primary driver, we exist to advance the missions of our clients.

Welcome to this Open Source Extravaganza!

Black Fox Philanthropy exists to serve humanity through strengthening organizations like yours who care deeply about a more just, equitable, and thriving world for all. Yet we recognize not all nonprofits can afford to engage our team of ringers through our Core Services of Painless Prospecting, Advancement Outreach, Fundraising Communications Toolkit, or our Grant Writing Services. So, in this Fundraising Handbook we've pulled back the veil on our approach and methodologies through a largely "plug and play" resource. It is a great tool for onboarding new board members and development hires, while also strengthening all stakeholders' ability to engage funder candidates in deep, meaningful, and affirming conversations about your work.

We regularly publish new content on our Blog, and subscribe to Black Fox Brief for highly curated contented from around the sector - delivered to your e-mailbox every Monday.

In solidarity,

Natalie Rekstad & the entire ***Black Fox Philanthropy Team***

Black Fox Philanthropy is proud to be a Colorado-based company that is both woman-owned and a Certified B Corporation.

www.blackfoxphilanthropy.com

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CONNECTING DEEPLY WITH FUNDERS | CRAFTING YOUR WHY

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Recognizing that less-resourced NGOs can't afford to engage our fundraising services, one of the ways Black Fox Philanthropy serves the social sector is to be open-source on much of the content we've developed. We regularly release this content via our blog, and today is one of those days!

When we conduct board retreats, we do this exercise at the outset of the retreat, setting the stage for a meaningful day of connection and solidarity. We ask that board members prepare a response from the "personal why" section. Board members - while sharing the same North Star, the organization's vision — arrive at the work from different viewpoints. Enabling each other to be seen, felt, and heard on what brings them to the work and the boardroom table helps build stronger bonds and a deeper understanding around why working on behalf of your mission is theirs to do. It also helps in reaffirming their commitment to your organization, the mission, and the vision.

This is also effective in staff meetings/retreats.

I originally created this exercise a number of years ago for a client who was an intellectual giant and could talk about the mechanics of the programs quite well but was not connecting with mission-aligned funders in a meaningful and resonant way, resulting in less funding for a vital mission. My goal in crafting this was to take this client from a "neck up" approach, to more of an approach with vulnerability, authenticity, and emotional texture as a meaningful point of entry for discussion about the work. This approach also helps to create an invitation for the funder to share why they care deeply about the mission - including what may be in their personal story that would lead them to care as deeply as you do about solving the issue.

Note I reference this document in an entry in this training packet entitled Leading the Donor Dance.

CONNECTING DEEPLY WITH FUNDERS | CRAFTING YOUR WHY

Organizational "Why"

What I find most compelling about our mission is…

The most extraordinary thing to me about how our organization began this work is…

What sets our organization apart from others working to (your issue area) is…

Why that matters is…

Personal "Why"

The mission of my organization is personally significant to me because…

What originally drew me to this work was a deep frustration around…

What was most exciting for me in the early days of this work was…

What's most exciting now is…

What I'm most proud of in this work is…

The stories (or story) of our impact that touches my heart the most are…

What keeps me going in this work, despite the long hours and sacrifice, is…

My ultimate vision for our impact is…

To go deeper into the concept, I recommend Simon Sinek's book Find Your Why: A Practical Guide for Discovering Purpose for You and Your Team or his TED Talk Short on the topic.

LEADING THE DONOR DANCE |
CHOREOGRAPHY THAT TRANSLATES INTO DEEPER RELATIONSHIPS AND INCREASED FUNDING

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Designed for high net worth individuals & family foundations; however, this process fits well with all funders, if customized to the specific funder. What connects all funders, including those who represent funders, is their humanity.

This process increases the odds of great outcomes through a system that connects you deeply to current and future funders. This choreography will reveal your funder's emotional link to your mission, build your and your organization's credibility, and develop lasting relationships that make the necessary work of fundraising more fulfilling. Please note that this level of document is intended as a "cut & paste" and "plug and play" approach for the novice to more experienced fundraiser, including board members. Add more questions based upon field experience as a fundraiser; your hands-on experience with your funders should inform and enrich this living document.

Rule #1: Seek First to Understand, Then to Be Understood (Covey). Be genuinely curious about the funder's story and appreciate their philanthropic journey to date. When you ask your questions, deeply listen to their responses. It is worth repeating: Deeply listen to their responses! Listening, not pitching, is the pathway to deeper engagement for both sides, resulting in greater emotional investment in your organization that translates into greater financial investment and advocacy for your organization.

Rule #2: Know Your Funder. Finding the giving priorities of a foundation are easily uncovered via the internet, however, obtaining a giving profile on individuals is harder to come by unless you or your "connector" has insights. Go in with at least two nuggets of information to show your donor that you are focused upon them and that you are genuinely exploring if they are a fit.

Rule #3: Lead the Donor Dance with Questions. The donor should be doing the majority of the talking, but it is up to you to lead the dance in a way that helps them arrive at the outcome that is of the highest good of all. The suggested questions in this document can be omitted or altered, mixed or matched, to reflect the personality of the development person, and the donor. Tailored questions should not exceed one page, and many will be abandoned based upon conversation flow.

NOTE: The spirit of this document is to help reveal the funder's heart and share your own heart/your "why" in this journey that you will embark upon together. While one-off gifts are fine, the ultimate goal is to develop deep and sustainable alliances that are based on a shared vision.

Rule #4: Don't respond to answers immediately. Take Notes. The answers they provide are specifically telling you how to enroll them as your funding partner, but you need to do so elegantly and <u>in its right time</u>. It may be in the initial meeting, or it may be a much larger ask that requires a formal written request and/or presentation, and other decision makers.

Rule #5: Reflect back their vision and tie their vision into your Case for Support. Reflect back what the funder has said are the key reasons for giving ("Let me see if I've got this right…." "Did I miss anything?"). Then share how your organization matches their giving profile. Don't add on what is not necessary. Just because you think it's a great feature of your work doesn't mean the funder cares. In fact, it could pull attention away from what the funder most wants to focus upon in your work.

A. Bonding/Rapport

Build trust through shared experiences and a shared vision around advancing your mission. Always share why is this yours to do. Trust is something that is partly earned because they see your passion and your commitment to the cause. Sharing the "why" behind your work, the cause, belief or purpose immediately connects to the limbic part of our brains that builds trust and loyalty. Refer to the "Crafting Your Why" worksheet to uncover key messages that make you come alive.

In short, to be truly effective, you need to care deeply about the cause you are representing so that you can connect to the funder in a heart-centered way. From that space, you build your relationship with the idea of linked arms, vs. hand out. You are in it together - as equals but coming from different forms of contribution - to solve the issues you all care about.

B. Up Front Contract

Loosely translated, let's show an appreciation for one another's time, and set the tone as equals exploring and joining together to solve an issue. Set expectations.

1. What most inspired you to invite me in to talk with you about solving (issue area you are working on)?

2. We've set aside an hour. What do you need to experience or know to feel confident this was a great use of time together?"

3. I take a deep dive with our potential partners to understand their journey and their vision for a better world. Are you comfortable with my asking a number of questions to get clear on what that vision is?

4. After we've invested this time, we can decide if this work is ours to do together. If we do decide to join together, we can discuss the next steps at the end of our meeting. Does that sound like a good plan?

C. Discovery Step (Seek to Understand) - Sample Questions

Before presenting your organization, uncover the funders' giving priorities and the "why" behind them. As they share insights, don't jump in with "we do that" - instead, wait. You're gathering information now that will inform your presentation/case for support.

For each question, if you feel there is more to uncover that is important, then you can explore it further with "Tell me more…"

1. You have a rich philanthropic journey; tell me about your gift to XX - What is it about the organization that inspired your engagement?

2. You've also been incredibly generous with XX organization. What is it that inspires that level of investment?

3. The more I learn about you and your giving, I'm struck by the level of intention involved. What do you typically look for in an NGO/nonprofit that will make you feel comfortable making a sizable investment?

4. What do you expect of the organizations you support (and/or serve)?

5. Based upon my understanding of your priorities, it appears that (insert your issue area) is core to your giving - Is that accurate? If yes, "Tell me more…. and/or How did you arrive at this strategy?" Or If no, "What is at the heart of your giving?" "What inspired that approach?"

6. What does a typical financial gift look like when you engage with a new organization? What would inspire you to make a stretch gift?

7. Under what circumstances do you sunset funding an organization?

Bring in additional questions that tie in your organization's strengths with the funder's priorities. For example, was gender equality important, peace building, economic prosperity/poverty alleviation? Examples include:

8. To what extent is peace building/economic prosperity/food security/clean water/sanitation an aspect of your giving strategy?

9. In light of the political landscape, peace building has gained important momentum in the social sector - is this something you've considered in your giving?

10. In light of Sustainable Development Goal (SDG) 5, Gender Equality, being core to achieving all 17 of the SDGs, to what extent is gender equality/access to education a part of your giving priorities?

11. Is there anything I may have missed?

D. Vision

People initially engage - for the most part - based upon emotion, which is why identifying vision and/or pain points is so important in the courtship stage. Without identifying and addressing the emotional link to your mission, the likelihood of a gift dramatically decreases. Help the donor realize the gap between where they are and where they want to be through probing questions:

1. What is your ultimate vision for (the issue area you both seek to solve)?
2. What frustrations have you encountered in realizing that dream?
3. What has been your greatest success story thus far in realizing that dream?
4. What ultimate impact do you see yourself having in the realization of that vision?
5. What's at stake if the vision is not realized?

E. Decision Step

Qualify or Disqualify the Funder. Does the funder make decisions on their own? Do they get help from an associate or spouse? Do they think things over. or can a decision be made now? The goal is to uncover the following:

1. Who is involved in the decision? Who makes the final decision? What is the decision-making process?
2. What is the timeline?
3. What will they base the decision upon (most of this content should have been uncovered in the Discovery phase)?

Sample Questions

1. How do you typically arrive at a decision about what organizations to support? Do you get input from your spouse/family? Any help from others? (Note: When husbands and wives give together, the checks are typically larger.)
2. If I were to ask you to make the transformational gift of $XX, what process do you undertake and what is a typical time frame before you arrive at a yes?
3. If I were to ask you today to make the transformational gift of $XX, what would you need to know to say yes?
4. We are launching a project in the community of X in February that focuses upon X. We'd love to partner with you on this. What do you need to know by December to work with us as a partner on this project?

F. The Funder-Centric Case for Support

Tie in things they've shared, demonstrating you heard them and are tuned into what is important to them in their giving.

Use visuals! 65% of the population consists of visual learners. "Do you mind if I show, not tell?" Have a slide show with your live narrative (auditory learners), and/or video, highlighting how their vision ties into your work. In both cases, talk about the people in the slides/video. Tell behind-the-scenes <u>stories</u> of the people you are serving so the listener can connect with the human element beyond the visuals, while anchoring in your mission through storytelling.

NOTE: Many funders respond well to deadlines. It focuses their passion and why you are doing what you are doing. Example: Now that the program has been a proven success since 2007, the vision is ___________ by 2021, a 3-year plan that needs a financial anchor now, someone like you who also cares deeply about (issue area). You could go farther with: "I thought of you specifically because of your deep commitment to ________, and __________."

Paint a picture of how their specific gift will make a difference. The arc of that narrative should include:

* We Share in the Pain of How Things Are. We share your vision of _________________ (example: lifting millions out of poverty).
* This is How the Communities We Serve Used to Be.
* Because of Supporters Like You, This is How They Look Today. (Stories/Emotional Texture)
* With Your Help, We Can Have XX Impact Within One Year (Urgent, Tangible)/3 years.

G. The Ask

Quite simply: "We want to join together in our shared vision of ____________. Will you join us on this journey?" Make a specific dollar-amount ask based upon all you've uncovered. OR if you are not confident in a specific amount based upon how the conversation has unfolded, an alternative is:

"You've shared your heart and vision beautifully, and it's clear that solving this (issue area) is something you care deeply about. I would love to invite you to join us, but I'm not sure where to go next in terms of making a financial ask. Based upon all we've discussed, where do you see yourself?"

Another Way:
It's clear based upon our conversation that realizing our shared vision of ____________ is profoundly important to you. Under what circumstances would you:

- Make a transformational gift of $XX
- Make an unrestricted gift of $XX
- Make a 3-year pledge of $XX
- Leverage a challenge grant of $XX
- Other: Host a gathering like a Jeffersonian Dinner
- Other: Join our Board
- Other?

What they share in their answers are the specific ways in which to engage them. The next step would be fulfilling what they need to engage (as long as it fits within your mission, of course).

If the funder cycle is longer and involves a proposal or grant submission:

- Send immediate handwritten note with an article of interest or some nugget, of something that came up from your conversation.
- Send a second formal follow-up letter after the meeting to recap your understanding of the donor's giving priorities. Advise them that this is the framework for a formal proposal. Then ask, "Have I missed anything?" Note: a written proposal/grant submission should be based primarily upon these funder priorities.

- Regardless of if person commits at that time, ask: What other potential supporters do you feel should know about our work?
- Would you be open to making an introduction? Or may I reach out directly and share that you suggested we connect?

NOTE: Customize, add and delete questions based upon the funder, the circumstances, and your own style.

H. DECLINED FUNDING RESPONSE

If the answer is no, get clear on why you were invited to meet/submit a proposal, why the declined funding, and what opportunities may still exist in the future.

1. What was the original inspiration behind inviting us to submit a proposal?
2. What was the most compelling aspect of the submission?
3. What aspects of our organization set us apart in a positive way from other organizations you've funded?
4. What areas do you feel could be improved upon?
5. What do you feel is the weakest link in our submission?
6. What would have made that weak link stronger?
7. What could I have done differently in our conversation to have arrived at a yes?
8. On a scale from 1 - 10, where did we land in terms of being a fit with XX Foundation?
9. What would have made it a 10?
10. What is your greatest funding amount given to other organizations in our issue area of ___________, and what are they doing that inspires that level of investment?
11. We are always seeking to improve. What are the core reasons you're not willing to invest in us at this time? If we're able to address these things, can we continue the conversation at a later date?
12. Who else in your funding network do you feel should know about our work? Would you be open to making an introduction?

Close with gratitude and a handwritten note within 24 hours.

RAPPORT & CONNECTION | STRENGTHENING FUNDER RELATIONSHIPS

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Your funders can be your greatest champions and thought partners. Engage these supporters as your allies through a process of understanding what is most deeply appealing to them about your organization, what would increase their engagement, and learning how to uniquely steward them in a way that will motivate them to stay personally and financially invested for the long-term.

The First Rule of Engagement is Listening. Seek First to Understand, Then to Be Understood (Covey). Be genuinely curious about the funder's story and appreciate their philanthropic journey to date. When you ask your questions, deeply listen to their responses. Worth repeating: Deeply listen to their responses! Listening, not pitching, is the pathway to deeper engagement for both sides, resulting in greater emotional investment in your organization that translates into greater financial investment and advocacy for the mission of your organization.

Each 1:1 meeting or call is customized based upon the funder/foundation profile, but below are questions that can be used. You can also pull key questions from the "Leading the Donor Dance" document. To start on the right foot, make sure you research their giving profile, and reference at least two key things about it that dovetails with your work. For example:

FUNDER: "Our mission is to foster a transformation from a world of domination and exploitation to one of collaboration and partnership."
YOU: "Yours is such a powerful mission statement; tell me more about how you arrived at that focus…."

FUNDER: "At the heart of our portfolio are our partners with a focus upon infrastructure."
YOU: "How did you arrive at infrastructure partners being at the core of your strategy?"

Always lead with gratitude! The objective of the call/meeting is to:

1. Make the funder feel seen, loved, appreciated, and important.
2. Make the funder a thought partner, and thereby more invested in your success, by engaging them with key questions. Further, funders have a unique view; there is a great deal to be learned in these interactions that can strengthen your organization.
3. Determine the relationship health with your organization and address any issues.

4. Make the donor feel confident in their investment in your organization and poised to make more significant gifts moving forward.
5. Uncover potential for deeper engagement beyond funding with your organization, such as board service or hosting cultivation events.

These conversations are often deep and affirming. It will also help bolster the staff/board members' commitment to your organization to be in such deep conversation with your funding partners.

Meeting Flow:

I've been so looking forward to talking with you. Thank you for carving out 30 – 40 minutes to share your experience and insights about your support of our organization.

The reason we are talking with you is to help craft a very high-level stewardship for our most committed supporters and creating strategy around attracting more partners like you who care as deeply as we do about (your issue area).

Sample Questions:

1. What was the inspiration for you initially becoming engaged with (organization)?
2. You've been generous with your investment in our organization. What is it about us that inspires this level of deep engagement?
3. What do you find most compelling about our mission of ___________?
4. This works particularly well in the female space: Our deepest passions often spring from our deepest wounds. Is there something in your personal story that would lead you to be such a powerful partner to us in solving ____________?
5. What is it that you're most excited about in your partnership with us?
6. What sets (organization) apart in a positive way from other organizations you support?
7. What are some areas that you feel could be improved upon?
8. What are the stories of our impact that most touch your heart?
9. What is your ultimate vision for our partnership in solving ____________?
10. What's at stake if this vision isn't realized?
11. Scale of 1 – 10, how strong do you feel the relationship between (organization and you) is? What would make it a 10?
12. Would you consider (organization) to be one of your top funded organizations.
13. What is your greatest funding amount given to other organizations/issue areas, and what did they do that inspired that level of generosity?
    a. <u>Option One:</u> What would it need to look like for you to feel confident and comfortable investing in (organization) at that level?
    b. <u>Option Two:</u> What would it need to look like for you to feel inspired to make a stretch gift of $XX to (organization)?

   c. Option Three: What would it need to look like for you to feel comfortable increasing your investment to a milestone (for you and organization) figure of $XX?
14. We are planning X campaign in November to accomplish X, and we'd like to invite you to join us. What would you need to know between now and then in order to make a Leadership gift of $X?
15. Your involvement is an immense part of our impact and its legacy in creating change. How do you see your legacy being further shaped with us over the next few years?
16. In your planned giving/estate plan, is our mission part of your legacy?
17. Under what circumstances would you include (organization) in your planned giving?
18. Under what circumstances do you discontinue funding an organization?
19. Do any of these apply to your funder? What would it need to look like for you to:
    a. Make a transformational gift of $XX
    b. Make an unrestricted gift of $XX
    c. Make a 3-year pledge of $XX
    d. Join a launch committee for a campaign
    e. Leverage a challenge grant of $XX
    f. Host a gathering, Jeffersonian Dinner
    g. Include us in your Legacy / Estate Plan
    h. Join our Board
    i. Other
20. As one of our most significant partners, we want to be sure our appreciation for your support is truly felt. Beyond our deepest gratitude, how can we show our gratitude for you in a way that would really be felt by you?
21. What other funders do you feel should know about (organization?
22. Would you be open to making introductions? Or have me reach out and share you encouraged me to do so?
23. Is there anything that I may have missed that you could share that would strengthen our organization or our relationship with you?

Close with gratitude and a handwritten note within 24 hours.

THE POWER OF STORY | ENGAGING FUNDERS VIA COMPELLING STORYTELLING

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Neuroscience shows the brain is wired to respond to storytelling, making it a uniquely effective way to capture an audience's attention. The listener's empathy increases as they put themselves in the character's place. It helps them to understand an issue from a different perspective, ideally from a "felt" sense of being in the protagonist's shoes. Thus, stories powerfully influence how funders think, feel, and act.

Yet researchers estimate the average person spends over 12 hours per day consuming various types of media. Your job is to cut through the noise by telling your story in a compelling, engaging way that inspires your audience to want to join you in changing the world for the better.

In his book, The Hero with a Thousand Faces, Joseph Campbell set forth the common patterns running through hero myths and stories from around the world and through the centuries. He discovered that there are stages of almost every hero's quest, no matter the culture. He called this narrative arc the "Hero's Journey", and we see it come alive in films such as Star Wars, The Wizard of Oz, and The Lion King.

This arc can be an effective tool by engaging your audience through compelling storytelling about you, your mission and vision. It begins with a quest that's deeply personal to you, a "Call to Adventure." In my case in working toward gender equality, I've often shared my belief that our deepest passions often spring from our deepest wounds. My quest toward a more just and gender-balanced world stems from my experience of feeling marginalized in my family and culture for being female.

Why did you create your organization? Why your vision, and why you? What's at stake if your vision is not realized? And to do with fundraising, why should the funder care? Each journey differs, but the following core ingredients have been used through the ages as illustrated by Campbell:

1. The Quest. As a social entrepreneur, your life's work is to solve something fundamental to the core of who you are and pursuing what is uniquely yours to do.
2. Obstacles. As individuals, we don't have all that we need at the beginning of the journey, and callings call for us to grow into them. It is the same with your organization. The obstacles each organization faces may be different, but each has obstacles to overcome. For example, you may be dealing with cultural, environmental, political, or financial issues, and so on.

3. Helper or Guide. These are your funders, consultants, board members, and mentors. The leaders from the communities themselves are helpers and guides as the sector has thankfully become more human design centered. The guides come in at certain inflection points in the story. In fact, during your story arc, you'll see countless cycles of obstacles, helpers, and triumphs.

4. Transformation. For the people with whom you are in a community with and serving, there is transformation via your work, for your organization as it evolves, but there is also your own transformation as a leader.

And yet when telling our story or the story of our organizations, many of us come at it from a "neck up" perspective, using practical, data-driven narratives. While it is important to give supporting evidence to engage funders initially, employ "neck down" emotional texture through inspirational storytelling about why your work matters, why now, and what's at stake. And because we are hard-wired to feel more for a single person than a large group, stories about individuals have been shown to directly increase funding amounts. When doing so, illustrate how the problem affects the individual's life in profound ways. Whenever possible, use visuals — 65% of the population consists of visual learners. "Do you mind if I show, not tell?" Have a slide show and/or video with your live narrative (auditory learners), and talk about someone very specific (who is on their own hero's journey) in the slides/video by name in a way that illustrates the bigger issue, while still humanizing it in a way that anchors in your mission. For example, the following story of Anna follows the storytelling arc, but would become more alive combined with visuals:

Anna is a 13-year- old girl living in an impoverished rural village in western Malawi. Anna is the oldest girl among six siblings and therefore, in addition to school, spends about eight hours each day helping her mother care for her family. Despite this hard work, Anna is a bright, funny girl who loves to make people laugh. She is a dedicated student and aspires to be a doctor.

To illustrate the problem you exist to solve, the story continues:

Despite her determination and sunny disposition, Anna struggles every month to overcome the many cultural barriers that can derail her education, robbing her of the chance at a better life. Among these challenges is a lack of resources to cope with her monthly menstrual cycle. With no money to purchase a washable, reusable sanitary pad, Anna must stay home from school for 5 days out of every month or risk humiliation and/or attack for bleeding through her skirt, or endure the alternative of trading sex for sanitary pads in order to stay in school. With each passing month of her adolescence, Anna falls further behind in her schoolwork and will ultimately be forced to drop out of school. With no education, it is likely Anna will find herself pregnant, HIV positive and doomed to a life of poverty by the age of 14.

Every good story arc has waves of triumphs and defeats that build toward a climax. Sometimes they are one step forward, two steps back, but eventually, they lead toward the achievement of the overarching goal. For example, the following illustrates the challenges of the journey, but also how your organization was able to contribute to "The Solution":

(Your organization's name here) began working in Western Malawi in 2012 and has since established women's co-ops in 22 villages where women sew and sell reusable menstrual pads at affordable prices. In each village, (your org) encountered more resistance than expected from the male village leaders and, as a result, women were slow to participate in the co-ops. But we persevered through investing extra time/effort in whole-community education and engagement. While this learning curve was costly in both time and treasure, it was valuable for building a stronger model moving forward and allowed (your org) to bring its program to Anna's village. After hearing about (your org), Anna's mother was able to buy Anna a pad with little economic hardship to the family. Since then Anna has not missed a day of school in seven months and her academic performance is soaring. She is closer every day to her goal of becoming a doctor!

Anna's story becomes even more powerful when told in her own voice. This is easier to do with video or written communications; however, in a face-to-face meeting you can pull quotes from her first-person narrative:

"My friends and I want to have a better life, but some of them trade sex for sanitary pads so they can stay in school. I want to be a doctor someday, but I'm scared that will be my fate, too. Or worse, I get sick or pregnant and leave school anyway – no education, no skills, and no hope. I want to show my brothers and sisters that I am strong and smart, and there is a better future for us."

It matters how you tell the story as well – with passion and authenticity – to inspire confidence that this issue area is indeed uniquely yours to help solve. And while your story is highlighting a problem and the suffering caused by it, convey the triumphs along the way, and a sense of hope for completion of the quest. This is an inspirational story of slaying dragons and bringing about wellbeing and prosperity for the communities you serve. This is where you can bring in the supporting evidence of your work that illustrates your track record, your Case for Support, and the obstacles/battles ahead in fulfilling the quest. Sharing those obstacles is a segue to the "Ask" and your invitation to them to become part of the story that leads to "Transformation", ideally theirs as well as that of your organization and the communities you serve.

Conclusion

By relating your organization's cause using the timeless and resonant narrative arc of a Hero's Journey, you'll capture your audience's imagination more effectively. Compelling stories such as your Hero's Journey develop meaningful connections that inspire and motivate through empathy and understanding what's at stake for your issue area from a different perspective. We're wired to root for the hero, but it is even more thrilling for a funder to join the hero on his or her Quest.

Note that funders have their own Hero's Journey as well, and a personal "why" they care about the quest.

Unlock Vital Funding via Compelling Communications

A commitment to advance the social sector and amplify impact is central to the ethos of Black Fox Philanthropy. In that spirit, and in celebration of our 7th Anniversary, we recently hosted a pro bono webinar focused upon fundraising communications and are proud to share it with you today!
We know that for many highly impactful organizations, communicating your work in a way that attracts and resonates with funders can be a significant pain point, hindering both your fundraising efforts and your sacred missions. Some of the questions we hear often from our clients include:

- How do we distinguish ourselves from peer organizations?
- How can we be more concise and clear in our messaging?
- Are our current communications ethical and dignifying?
- How can we be solutions-oriented without minimizing the problem we are trying to solve?
- How do we escape using jargon to describe the more technical aspects of our approach?
- How can we communicate so as to catalyze action?
- What are funders really looking for?

Understanding the nexus between messaging and fundraising, our seasoned team of Communications Specialists came together to answer these questions and more, pulling back the veil not only on how to *do* funder-centric communications, but how to *think* about it as well.

In this one-hour session, communications experts Kellyn Lovell, Caroline Fothergill, and Rosie Urbanovich will guide you through Black Fox Philanthropy's proven message development process, offering best practices and readily actionable insights to boost your fundraising success in the short and long-term while building your organizational capacity and development team skills for engaging new funders. You'll learn to develop smart, targeted, inspiring messages and a toolkit of communications assets to help unlock new sources of revenue.

To take your organization to the next level of fundraising communications, you can watch the webinar recording HERE and view the accompanying slide deck HERE. Also available to you is the folder of sample resources referenced throughout the presentation.
The rich content found in this session is just a taste of the expertise our team can offer to your organization. To learn more about how our Fundraising Communications Toolkit can help you to deliver fresh, compelling, and persuasive language to serve as the basis for all your fundraising communications going forward, please visit our Services page and reach out to Julie Cullings at julie@blackfox.global to schedule an exploration call.

P.S. – In partnership with [The Resource Alliance](), we are offering an encore presentation of this webinar on Wednesday, September 16, 2020 at 4:30 PM British Summer Time (BST). To join us, register HERE.

Virtual Skoll World Forum | Black Fox Philanthropy Three-Part Series | Engaging Mission-Aligned Funders in the Era of COVID-19, Part 1

PART 1: Funder Research | Best Practices in Uncovering Mission-Aligned Funders

First and foremost, we want to extend an enormous thank you to the Skoll Foundation and their incredible efforts in pivoting this year's convening to a virtual forum, where a series of Black Fox Philanthropy webinars were presented. The Skoll team's courage and creativity in such a unique global moment was rewarded by a show of #CollectiveStrength: over 100 organizations organized more than 140 ecosystem events, creating an incredibly rich and inclusive week of programming for more than 10,000 participants around the world. Black Fox Philanthropy is truly grateful for the opportunity to play a small part in such a wonderful week.

Central to the Black Fox Philanthropy DNA is a deep desire to serve the social sector. One of the ways we fulfill this ambition is through an open-source model, regularly releasing accessible content developed through our work to this blog.

In light of the altered landscape of philanthropy in these unprecedented times, our team worked together to amplify existing efforts to resource the sector and produced three tactical, rapid-response webinars focused upon engaging new funding sources, particularly in the era of COVID-19. The content covered in these sessions pull back the veil on some of our most powerful services and offer powerful insights for organizations seeking new or ongoing funding.

Without further ado, you'll find the recording to the first webinar, Funder Research | Best Practices in Uncovering Mission-Aligned Funders HERE and the accompanying slide deck HERE. This session led by research experts Karen Doyle Grossman and Jenni Klock Morel. serves as a guide to prospect research and building a robust funding pipeline. You will learn best practices in the field and access resources to help you identify new prospective funders that will amplify your impact and help to change the world for the better. The nearly 500 registrants asked insightful questions during the session's open Q&A, and offered tips and tricks of their own that we included in this resource found HERE.

Virtual Skoll World Forum | Black Fox Philanthropy Three-Part Series | Engaging Mission-Aligned Funders in the Era of COVID-19, Part 2

PART 2: Engaging Mission-Aligned Funders | Advancement Outreach Best Practices

Echoing our sentiment from Part 1 of this series, Black Fox Philanthropy would like to congratulate the entire Skoll Foundation team on hosting such a valuable virtual gathering. The first of its kind in the convention's history, the Virtual Skoll World Forum featured over 100 organizations presenting more than 140 ecosystem events, reaching more than 10,000 participants worldwide with compelling content – a true show of #CollectiveStrength. We are truly grateful for the opportunity to play a small part in such a wonderful week.

As part of our commitment to the social sector, Black Fox Philanthropy employs an open-source model, releasing content designed to strengthen the fundraising capacity of organizations in all stages of development to this blog. However, the onset of COVID-19 and the cancellation of important gatherings around the globe demanded a stronger response, so our Advancement team produced three tactical, rapid-response webinars that lend insight on how to build and maintain powerful, long-lasting funding relationships.

You can listen to the second session, Engaging Mission-Aligned Funders | Advancement Outreach Best Practices, HERE and view the accompanying slide deck HERE. In this 75-minute session, Black Fox Philanthropy Advancement Specialists Toby Banks, Kellyn Lovell, Kelly Baxter Spitz, & Karen Doyle Grossman share best practices for "getting in the door" with new funders, building a foundation for relationship by intentional storytelling and story listening, maintaining existing relationships through thoughtful stewardship, and deepening relationships in shared learning journeys.

ADVANCEMENT OUTREACH GUIDELINES

These guidelines were created to help our **Painless Prospecting** clients confidently and knowledgeably initiate contact with new funding prospects. The emphasis here is on making inroads when you have no insider connections. However, the same principles can apply with warmer leads. These guidelines will review the main Advancement Outreach Guidelines that the Black Fox Team utilizes on behalf of clients in our Advancement Outreach service. We hope that you find it helpful, and as always, are open to your feedback!

TIP #1: If a phone number is listed, unless the funder explicitly states, "no phone calls," ALWAYS CALL.

- A primary rule in fundraising is that: If you want to communicate, email; if you want to move something forward, call. While an email can feel less intimidating, a phone call allows you to make a human connection. There is a saying in fundraising: People don't give to causes, they give to people. What do you do if you don't have any contacts? You make that connection yourself; and a good phone call can make all the difference. If there is number but just an email address is listed, your email should always include a request to speak further on the telephone.

TIP #2: If there is no getting around needing to proceed via email due to explicit instructions, we recommend the following protocol:

- Email with a compelling opener and stating materials on the way, "…delighted to discover you are as passionate about ___as we are. Sending you more information via snail mail that highlights how our core missions dovetail…."
- Mail letter with collateral, include handwritten note.
- Follow up call to collateral, engaging them in a funder-centric way (having done your homework)
- After your conversation, send them something of interest that ties into the conversation you had, but not about your organization, like a thoughtful article about the issues you both care about or something else. There should be no ask in this communication, just a "thinking of you…"
- Professional persistence.

TIP #3: Always do your homework.

- The more you have researched their interests and past and current funding - both organizations and amounts - the better equipped you are to make a real connection and engage them by having funder-centric conversations. If they give money to an organization that does similar work to yours, ALWAYS be respectful of that organization
- They may do great work but emphasize what sets you apart. Feel free to point out that they fund similar organizations and share your thoughts about how the nuanced differences with your organization help align you to the funder's interests. "What sets us apart from other worthy organizations you support is ________. Why that could be a game changer is for solving this issue is ____________."
- Homework also includes knowing as much as you can about the individual with whom you are speaking. Knowing where they've worked before and reading articles they've published, or the topic of their PhD dissertation etc. can help you refine your conversation. Even if they are not the money behind the foundation, they too have their own "hero's journey" to working in this sector and may have a personal reason for working on behalf of the issue areas the foundation exists to solve. Connect human to human by being curious about their journey to impact; you may find that you have much in common. This person is an influencer in the organization, but aside from that, it is affirming to be able to talk about something to which you both care deeply.

TIP #4: Approaching funders who say "No Unsolicited Requests"

- In general, it is important to respect their wishes and move along. This is not only respectful but strategic and can free you up to pursue more optimal inroads elsewhere. That said, if you feel there is a strong fit, acknowledge that they don't accept unsolicited proposals, and ask via email what it would need to look like for them to skim something that may hit a bullseye with their priority of fulfilling their mission of ________________. A softer approach like this will generally not burn bridges in the future if you find a connection to the organization that is warm.

- If you will be at a convention together, reach out with a message to the effect of: "It would be wonderful to meet a kindred at Skoll who cares as deeply about ___________ as I do. I hope our paths cross during the week." Then make a point of meeting them and asking for a coffee/meeting/phone call.

TIP #5: Reaching out to funder contacts who say "No Unsolicited Requests"

- If you do reach out to an email address or phone number listed on their website, it is very important that you don't request funding. In fact, you should mention that you KNOW they don't accept unsolicited requests. You must instead approach this as an introduction to your organization and wanting to learn more about the potential for an alliance in the future. This is purely informational. Language such as this can be helpful:

- "While I know that XYZ Foundation does not accept unsolicited requests, I am struck by the synergy between your interests and our work — I was hoping to have the opportunity to tell you more about our efforts in ABC field and how it dovetails with your priority around solving X."
- The return rate on this type of outreach is not great. but it can occasionally lead to funding. Again, even if they respond positively, it is essential that you let them lead the conversation about funding initially. Continue to keep the conversation "informative" until the door is opened to a discussion around funding.

TIP #6: Engaging funders who allow unsolicited requests and have a set RFP (Request for Proposal), either with a deadline or open

- Even with an explicitly stated application process, see Rule #1. ALWAYS CALL (unless they say, "no phone calls") Making that human connection, and "seeking to understand before you seek to be understood" (Covey) by learning more about their priorities and process can help push your application to the top of the pile.
- Helpful language includes: "I see that you are accepting applications for a (DATE) deadline. Prior to applying, I was hoping to learn more about your process and priorities so that we can submit the strongest proposal possible. I have a short series of questions. Can we set aside 20 minutes over Zoom so that we can be sure we are a fit for your core mission of solving ____________? It will also give you a chance to get a sense of if we're as strong a fit as I sense we are."

TIP #7: Communicating restricted project proposals whilst finding where you fit in their criteria

- If the proposal would be for a restricted project, rather than general operating expenses, use a call to let THEM GUIDE YOU about what aspect of your programming might be the best fit. Come to the conversation with your own ideas, but always inquire as to whether they agree that that aspect of your programming is the best fit, and keep the conversation open enough to share other areas of programming in case they think there is a better fit.

TIP #8: Funders who allow unsolicited requests, but no RFP or application process listed

- Use the fact that no application process is listed as your excuse to follow Rule #1 - ALWAYS CALL. If you get someone on the phone, don't just inquire about the application process. Use the opportunity to engage them not only about your work, but how they arrived at that being their core issue area, their journey thus far, and their greatest successes.
- After really hearing them, you can follow up with an exploratory tone: "Would it make sense for me to tell you a bit more about (YOUR ORGANIZATION), to see if there is a synergy between your mission and our work? At the end of that conversation, we can decide together if it makes sense for us to apply for funding."

NOTE: We honor the brain-trust and experience of our valued clients. If you have had successes using methods not outlined here, feel free to share via comments to this blog or directly with Black Fox Philanthropy to disseminate so we can support organizations as well as possible in the future.

Virtual Skoll World Forum | Black Fox Philanthropy Three-Part Series |
Fundraising Roadmap | Attracting Bold & Big Bet Funding, Part 3

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp
& Kimberly Westerfield, Partnerships, Programs and Grantmaking Manager at Western Union Foundation
(formerly of Skoll Foundation)

Weeks ago, we had plans to publish an exciting report, Bold & Big Bet Philanthropic Landscape, here on our blog. This report, compiled from the findings of a series of generous and candid interviews conducted with major funders across the sector, and in-depth research and analysis, seeks to answer the question "What inspires institutional philanthropic entities to invest at their most significant level ($1M+) in a single organization, project, or program?" However, before the finishing touches of the report were made, the sector (and the world!) began to feel the effects of COVID-19.

To ensure the safety and wellbeing of the community, the brilliant folks behind the Skoll World Forum made the brave and wise choice to pivot the convening to a virtual forum and appealed to the "brain trust" of the Skoll ecosystem to deliver a robust week of learning and collaboration. When the invitation to present an ecosystem event was offered to Black Fox Philanthropy, the would-be blog post was converted to a
75-minute webinar, Fundraising Roadmap | Attracting Bold & Big Bet Funding. Presented by Natalie Rekstad, founder and CEO of Black Fox Philanthropy & Kimberly Westerfield, the Partnerships, Programs and Grantmaking Manager at Western Union Foundation (and formerly of the Skoll World Forum), this session offered valuable insights and tools to accelerate the pace in which participants might engage in more sophisticated and transformational funding. We wish to extend our deepest thanks to the Skoll World Forum team for inviting Black Fox Philanthropy to be a part of such an impactful week.

An audio recording of the webinar may be found HERE, with a link to the slides HERE. Some of the resources referenced in the session include:

- The Funder Landscape and Scorecard template
- The Bridgespan Workbook: Key Elements of a Big Bettable Concept
- Sample profiles from Rockefeller Philanthropy Advisory, Bill & Melinda Gates Foundation, and MasterCard Foundation.

Additionally, we are pleased to share the full report below.

BOLD & BIG BET PHILANTHROPIC LANDSCAPE

The guiding question for this report is: "What inspires institutional philanthropic entities to invest at their most significant level ($1M+) in a single organization, project, or program?"

In the most recent 'Trend Shifts in Ultra Wealthy Giving' report, Wealth-X estimates that there are more than 212,615 ultra-high net worth individuals (UHNWI) in the world, worth a total of more than US$30 trillion, and of these, 18,500 (8.7%) are estimated to be major donors – as defined as those who have made a significant gift of at least US$1M to a philanthropic cause or organization in their lifetime. Additionally, 85% of the top 20 billionaires from around the world have their own philanthropic foundations as a vehicle for their giving. Given this information and conversations held with our client, we focused our research on the institutional philanthropic market.

Bold and big bet funds are every organization's dream, for many reasons. Bold and big bet funding requires less administrative overhead for organizations in the long term and therefore, rather than having to process, report-on and manage numerous smaller gifts, organizations are able to work with fewer and larger giving partners which tend to cut processing and relationship management time down significantly, freeing its staff to do more mission-critical work. It also gives organizations more of a runway allowing them to plan and execute against the complex issues they are working on. There is never a convenient time to focus solely on fundraising, especially when half of the average organizational leader's time (at minimum), is focused upon it. This naturally puts other key priorities and livelihood-dependent programming at risk. Bold and big bet funders also tend to be more engaged, passionate, and willing to champion for (especially amongst other funding peers) the organizations they invest in at such a level, which often results in more funding and positive exposure, given that word of mouth (WOM) is still the most effective marketing tool in the space. It also allows for a more productive collaboration given the strong incentive for engagement from both sides, which can expose opportunities for funders to assist an organization beyond their monetary gift but also in providing aligned and essential technical assistance, filling gaps, along the way.

However, from a funder's standpoint, bold and big bet gifts also tend to come with a lot of responsibility and risk which make this kind of practice more of the exception rather than the rule, especially amongst philanthropic institutions. Therefore, these kinds of opportunities are often few and far between in the grantmaking space. While there tends to be more of a burden on the receiving organization's upfront time investment i.e. long labor-intensive applications and a more rigorous due diligence process, there is also a much larger pool of interested applicants amounting to much lower odds of being selected as a bold and big bet partner. And while this is the current reality, according to Wings' January 2018 Report, The Global Landscape of Philanthropy, it is stated that philanthropy's purpose is best (i.e. has the greatest impact) when used to do one of the following things; innovate, fill gaps, support civil society and/or act for the long term.

So why is this not what we are seeing in practice on the whole? For starters, so much decision-making depends to some degree on an institutional funder's willingness to take risks. According to the same report, most institutional foundations around the world are either risk-averse or much more risk-averse than they are willing to admit to themselves and/or express publicly. While we are seeing bold and big bet opportunities going in an upward trend, they are inching along that path slowly and, let's face it, the world today is anything but slow, especially when it comes to all of the issues and problems NGOs are desperately trying to address. This is amplified enormously in the era of COVID-19.

Given these less than ideal realities, at present, there are still some ways to stand out and better position oneself for a bold and/or big bet investment. This research draws attention to some key competencies of organizations that have successfully secured such gifts from institutional funders. A few important aspects to consider, and as suggested by a panel of bold and big bet funders that were interviewed for this report, can be summed up as follows:

1. Have your House in Order
2. Have a Clear and Credible Pathway for Change
3. Support this Path with Evidence and a Sound Financial Plan
1. Have Strong Leadership
2. Have your House in Order

1. Have your House in Order

Operationally and financially it is important to have good records and structures that give a sound financial and healthy organizational narrative. Funders looking to make a big bet investment want to know that you can handle it and scale with ease. Having a track record that shows sound stewardship, resourcefulness, and wisdom around financial decision making is paramount. Just as important are the operational aspects of the organization (especially, human resource management and culture) and how key departments are structured to support the organization's programming and values. Funders will, of course, look at senior staff, board, and leadership overall, but they will also look to see if an organization is strategically structured (not based on personality, familiarity, nepotism, legacy or anything else) to ensure effectiveness and accountability. At times they will explore if there is a plan for protecting and promoting diversity and equity. Having sound cultural guardrails in place that protect the organization from an "abuse of powers" or other potentially destructive forces, needs to be apparent and practiced in order to put prospective funders at ease.

Both of these elements need to not only be documented and clearly communicated across the organization but also should be known and experienced amongst staff, peers, partners, employees (past and present) and other people that come in contact with the organization. Some ways institutional funders collect data to analyze the strength of an organization's operations, culture, and finances are:

- Running OFAC checks on staff and board members
- Reviewing and requesting audited financials that show an organization's cash reserves, their restricted vs. unrestricted assets, and income streams
- Reviewing and requesting board minutes
- Speaking to other funders to hear their opinions and share due diligence
- Speaking to the organization's past and current partners
- Speaking to the organization's past and current employees
- Speaking to similar practicing organizations and/or experts working on similar issues and or in similar contexts
- Site-visits/in-person audits to meet key staff members and see an organization's operations in real-time

2. Have a Clear and Credible Pathway for Change

A recent body of work done by Bridgespan called "Becoming Big Bettable" describes a credible pathway as, "how the organization believes it can get to its five- or 10-year point of arrival (5-10 year plan) where concreteness and practicality show themselves and where social change leaders increase the odds that they will actually achieve their goals." Your near and long-term plan/pathway for impact and achievement must be succinct and a recipe of optimism, expertise, feasibility, and boldness. As a framework for brainstorming, your 5-year point of arrival can be the more tangible part and a jumping-off point towards your 10-year point of arrival, which can be more broad and ambitious. Clearly communicating your plans is just as important as the plan itself and being able to balance how you share your expertise in a way that reflects a deep understanding of the context in which you do your work, while also considering that the audience doesn't necessarily have that same understanding, is much more of an art than a science. One place to start is making sure you know your audience. Do your own research and due diligence on the funder that you will be speaking with and ask yourself the question: What might be their top priorities and goals? Many funders have expressed frustration in regards to this part of the process when there seems to have been little thought and time put forth to best determine shared alignment. Think of this as part of what makes your organization credible. Be strategic about which funders you are targeting and mindful/informed as to when to engage in order to increase your chances of catching their interest. First impressions are heavily weighted.

3. Support your Pathway with Evidence and a Sound Financial Plan

An institutional philanthropist once expressed that "any NGO with an operating budget of over a 1 million USD has no excuse to not have a robust impact measurement practice, especially given today's technology" While this sounds harsh, it does make sense if that organization is seeking more robust funding. If you are an organization working on a complex issue and are building services to help address it, it is paramount that your programming is being informed by objective evidence and healthy feedback loops.

Most philanthropist's north star is "first do no harm," especially in the institutional space, where remaining accountable to the public is how they maintain their legal operating status. How can an institution be accountable to their stakeholders if their grantees are not accountable to them? How do they know that the interventions used by "the experts on the ground" are moving the needle and working towards solving issues rather than perhaps creating more issues?

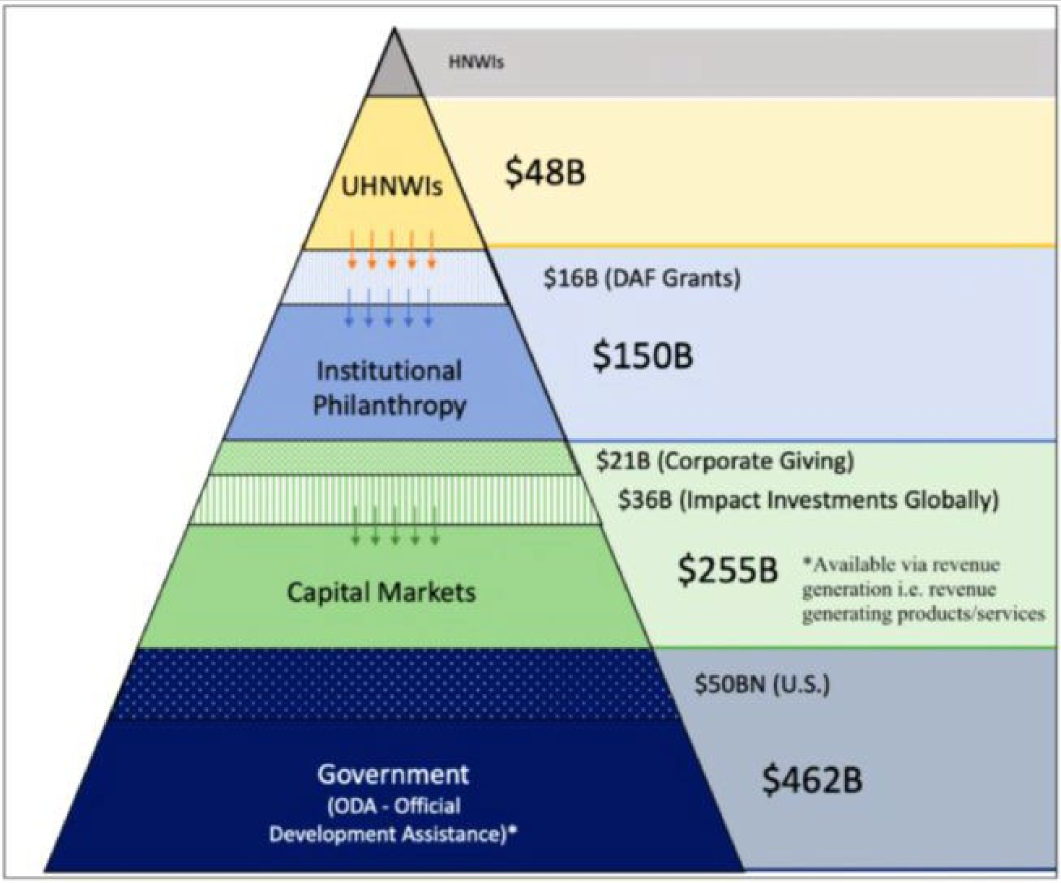
We've all heard the horror stories of this going awry, it is sadly what often ends up breaking through the news cycle more often than the stories of good and effective work being done by NGOs globally. No one wants to be associated with the former and most of us that work in the sector know that so much of development is like a game of "whack-a-mole", as one funder put it, meaning that the minute one problem is fixed another is created. Being conscious of this, not only the interconnectedness and complexity of societal problems but also that more often than not, this is an honorable place from which many funders are coming. Wings reported that while "Strategic philanthropy is (still) on the rise, bringing with it an increased emphasis on measuring impact, some view this as potentially harmful." Yet, impact reporting is a key component of accountability and this is one of the only tools in which many funders are able to not only satisfy their key stakeholders and benefactors but also to keep their legal status and ability to do charitable business in future years to come. It is important to understand not only to what level and to whom most philanthropic entities are accountable, and in light of this understanding, seek to honor and align with such parameters as you seek out your funding partners.

On the flip side, there is widespread recognition that at present, "All the statistics we have state that most funding goes to the safest areas – education, children, healthcare – not human rights". The reason being that it is quite difficult to measure human rights, especially when an NGO's interventions are preventative in nature and not responsive. It is difficult to measure prevention and therefore far more difficult to sell. Additionally, another challenge is that it can be difficult to measure across geographic borders where there are different legal structures and regulations for philanthropy and NGO entities. You won't get the clean comparison of measuring apples to apples. While the growth of cross-border philanthropy is impressive, the legal environment and other factors have limited global philanthropy from reaching its full potential. Indeed, "[philanthropic] institutions are not functioning optimally, constrained by policies, accepted practice, and legal and structural limitations." According to the Council on Foundation's "Legal Framework for Global Philanthropy: Barriers and Opportunities", which include constraints imposed by the "donor" country on the outflow of philanthropy, as well as constraints imposed by the "recipient" country on the inflow of philanthropy. Global philanthropy is also impeded because some countries constrain the development of civil society, including the development of foundations and potential grantee organizations.

We've seen most recently legal disruptions come into play with China's Charity Law and India's CSR Law. Considering all of the above and the fact that being able to measure and report on education and healthcare is a much more straightforward task, it makes it all the more important to have a sensical measurement, evaluation, and learning department that can help you pull even accurate anecdotal evidence that supports your case. Being able to report and prove impact is what allows most foundations and their staff members to champion for select projects and programming and therefore deploy more funding. So even though it is more difficult to measure impact in say the human rights space, making robust attempts to communicate your efforts to do so will help tremendously in bringing in more funding and at higher levels of capacity.

The only thing missing from a bold and audacious world-changing idea is a complementary smart and realistic financial plan to fuel it. Another informed way to help mitigate risk for your funders is to explain how you plan to scale your income and revenue as you scale your programming and impact. A key way to think about this is by first considering the different kinds of capital available to you and what combination of, and timeline for, pursuing this capital makes the most sense for you at different points of scale. Social change capital can be broken down into the following segments: ultra-high net worth individuals, UHNWIs, and high net worth individuals, HNWIs, institutional philanthropy, the capital markets, and government funding. The graph below shows how much from each segment was invested/deployed towards social change causes on average between 2015-2018 by those who have the capacity to make big bets.

POTENTIALLY AVAILABLE INVESTABLE CAPITAL



You'll also notice in the graph that there are arrows that show how some segments move through the pyramid to become part of a different segment. An example is; at the end of a wealthy individual's life, they seek to continue to make an impact beyond themselves through their children and therefore move from the UHNWI or HNWI segment, where perhaps the vehicle for giving was a donor advised fund (DAF), to the institutional philanthropy segment, so that their name and legacy will live on beyond their lifetime. You will also notice that many philanthropic institutions are now dabbling in impact investing and therefore moving more towards the capital market space.

Corporate foundations also sit close to their respective Corporations which are part of the capital marketplace and, therefore, if you are already engaging with someone in a Corporation you may be able to unlock funds from the Foundation and vice versa through this individual making an introduction. This graph is meant to help grantees think strategically about how and when to unlock different types of funding and what is available to them overall. Additionally, it helps to think about diversifying your funding sources as many funders have expressed that the more diversified a grantee's funding/revenue model is, the less risk they feel they are taking on. Generally speaking, funders giving bold and big bets still want to be sure that their gift is no more than 20% of the total revenue/incoming gifts expected to come into an organization over the next few years.

4. Have Strong Leadership

Leadership is probably the most important part of becoming bold and big bettable because oftentimes it is the leader who attracts the attention of funders initially. And as important as development staff and teams are, most big bet funders will want to engage more directly with the one or two founders/leaders at the helm of the organization, at least on the outset. There are many leaders that have the charisma and ability to get in the door with key funders. Once this happens, the former points become more important in order to secure the funding. Still, in many cases getting the meeting can be the hardest part, and this is where leadership plays a vital role. Many of the funders we spoke with touched on this aspect in great detail, expressing that the following are some of the key things they look for in a leader (as described in their own words):

Commitment, Passion and Humility
"Does this person have charisma, are they a compelling person, do they have the character of a leader? Is there kindness and generosity about them? Do they come across as ready to make it happen and don't have arrogance about doing so?"
"If you look at which organizations are established you see charisma and confidence mixed with a solid trajectory, someone who has been perceived as being in the same work for decades"

Depth, Context and Expertise
"Can this person have an in-depth and great conversation? Do they know who the other players are and where their organization stands amongst them in the field? Do they know the major issues and context well enough?"

Conviction, Character and Reputation
"Often our staff will talk with others about an individual leader and their organization to figure out if they are someone you want to be in business with. Some of this speaks to the question, are they smart and funny (compelling) but also seeks to find out what the founder's story is. How did they get into this work? What leads them to what they are working on? How does their staff interact with them? How do they interact with staff? To do with engaging with my foundation, do they treat (for example) the receptionist with as much respect as they treat me?"

Many funders are now prioritizing gender. Research has shown that there is still a large gap between women-led and male-led organizations when it comes to who is receiving the bigger piece of the philanthropic pie. Further, research shows that women tend to be more resourceful with the funds they are given and therefore can do more with less, which is something that should be very attractive to philanthropic gift-givers. We won't get into the systemic reasons why this is the current state of play, but wanted to highlight that there is a strong consensus amongst the bold and big bet funders that we interviewed in their desire to be more intentional about investing in more female-led organizations in order to close this gap and disrupt the current status quo.

While the aforementioned attributes can help position an organization for bold and big bet funding, further investigations reveal that relationships and connections still take precedence. This means that even if an organization has all of the aforementioned attributes, if they do not have access to the right people, they will have a much harder time (if given the chance at all) of securing bold and big bet gifts. Therefore, it is safe to say that the most important element in decision making for any organization is trust, which comes with a sense of familiarity, consistency and intentional relationship management. Quite a few of the funders we spoke with mentioned that if they are not familiar with an organization and have not funded them in the past, it is unlikely they would place a bold and big bet on them. There, of course, are exceptions, such as when an organization is a collaborating partner with another organization that happens to already be a grantee of a foundation, or if there is a request for proposals very specific to a certain issue or issue area so new grantees are looked at more closely and equitably, but it is more likely that foundations will first give a smaller "get-to-know-you" grant to begin building the relationship before giving a large lump sum.
Additionally, foundations rely heavily upon their peers and other credible practitioners that they already have strong relationships with to source their bold and big bet grantees. In the case of Co-Impact, the organization has an experienced in-house team dedicated to sourcing, vetting, and providing deep, ongoing support to initiatives. Audacious consults with a panel of expert advisors that, in many cases, have been grantmaking at their own institutions for years. It is rare for an organization that no one has heard of to land in their purview, however, as mentioned by both organizations, this can also be a stumbling block for grassroots international organizations (especially ones where English is not their first language) and is something that these institutions and the overall philanthropic space is actively looking to solve for over the next few years.

Summary

In conclusion, for an organization to become an ideal candidate for bold and big bet giving, it must focus upon effectively building and communicating its impact measurement, path to scale strategy and network. Getting clear and aligned on a theory of change (TOC) (with big bet funding in mind) is the best place to start. Then, testing this theory with current stakeholders, other practitioners/partners, academics focused in the same field of work, and current funders will help to refine your TOC and give practice to how it can and should be communicated broadly and with regard to specific groups of stakeholders.

Ensure your leadership is solid in the key areas mentioned in this report, but also always evolving to become more effective not only for the organization they are leading but for the sector as a whole. The leadership team, including the board composition and executive committee's roles and effectiveness in those roles, will also set an organization apart as it demonstrates a vision and solid plan for strength and impact outside of relying upon the main person at the helm who often plays the role of the "face" of the organization.

Remembering that every relationship matters and that most introductions are between 3-6 degrees of separation to your next "big bet" relationship should be kept in mind. And lastly, as most fundraisers and CEOs know, consistency is key. Even if a conversation doesn't end in the level of investment you were hoping for, keep going, keep learning, and refining your approach. Oftentimes there can be a point-of-entry investment that can lead to bold and big bet funding down the line. Once you are in that stratosphere, the sky's the limit!

FUNDRAISING ROADMAP: DEMYSTIFYING THE COMPLEXITIES OF THE FUNDER ECOSYSTEM

Congratulations to the Skoll World Forum team for another successful event, and to the 2022 Skoll Awardees! Black Fox Philanthropy would like to thank everyone who attended our
live webinar on Friday, April 8, Ecosystem Day, during the Skoll World Forum to share how we take the guesswork out of fundraising efforts. The webinar, Fundraising Roadmap: Demystifying the Complexities in the Funder Ecosystem, may be viewed here.

The webinar supported the 2022 virtual Skoll World Forum theme, "Face/Forward," which focused on learning from past experiences while continuing to progress and thrive. Black Fox Philanthropy is a long-standing contributor to the Skoll Community, and we have been inspired by the way this community has risen to the needs of the times with grace and resilience.

If you are reading this as a team member at a foundation or fiscal sponsor, we encourage you to share this information with the organizations you support. Being open source is a core value at Black Fox Philanthropy, and this webinar is an opportunity for us to pull back the curtain and transparently share what we do.

About the April 8 Masterclass

The 60-minute Masterclass was designed to help organizations be more strategic and effective in securing funding by providing a roadmap of approaches, complexities, and diversity in the
funder ecosystem. Black Fox Philanthropy's Director of Advancement, Catherine Olteanu, Community Relationship Officer at Mortenson Family Foundation, Danyelle O'Hara, and Black Fox Fellow and Vice Chair of the Boston Women's Fund, Akosua Ampofo Siever, shared best practices for advancing relationships with funders in a complex and increasingly diverse ecosystem.

As part of our commitment to you and your fundraising success, the session featured actionable insights designed to move your work forward in 2022 and beyond.

As always, feel free to reach out if we can support your mission through fundraising core services, including serving as an extension of your team in engaging funder candidates.

General Helpful Resources

https://drive.google.com/file/d/1Tx6XeSJ8SVYt3aAXE0l8s6752sPx_k52/view

Discovery and Alignment

http://blackfoxphilanthropy.com/fundraising/rapport-connection-strengthening- funder-relationships/
http://blackfoxphilanthropy.com/fundraising/connecting-deeply-with-donors-crafting- your-why/
http://blackfoxphilanthropy.com/fundraising/virtual-skoll-world-forum-black-fox-philanthropy-two-part-series-engaging-mission-aligned-funders-in-the-era-of-covid- 19/

Navigating Invitation Only

https://www.instrumentl.com/blog/invite-only-grant-funders

Unlocking Unrestricted Funding

The Only Grant Writing Book You'll Ever Need, by Arlen Sue and Ellen Karsh – – https://vdoc.pub/download/the-only-grant-writing-book-youll-ever-need-2bobjujcruj0 download the free book in PDF form here through VDOC.PUB Library with permission of the copyright owner
https://www.liveplan.com/
https://www.convinceandconvert.com/content-marketing/improve-editorial-calendar/
Send Media Releases on a regular basis. – https://www.g2.com/categories/press- release-distribution/free
https://www.synergos.org/experiences/2020/funding-from-place-of-trust-launch

MAXIMIZING ATTENDANCE AT SECTOR CONVENINGS LIKE OPPORTUNITY COLLABORATION, SKOLL WORLD FORUM, AND OTHERS

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy & Topher Wilkins, CEO | Opportunity Collaboration

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Natalie: The first year I attended Opportunity Collaboration (OC) I did so at the suggestion of Sara Hall, a mentor, who also encouraged me to host a session on fundraising. An "unconference" focused upon poverty alleviation? I was working with the Denver Art Museum and the Women's Foundation of Colorado, and I envisioned continued impact in my own community, particularly around issues facing women and girls. It didn't seem to fit, but Sara shared that poverty is underneath the great majority of the world's issues, including what holds women and girls (therefore humanity) back, and urged me to experience it for myself. I flew to Ixtapa free from expectation. There was nobody I "had to meet" because I didn't know who anyone was. As my Irish grandmother would say, I "boobied into" the secret to OC – go as your whole self, not just your professional role, and with the willingness to serve.

Within days I was fully seduced by the global space. Let's face it: working in developing countries is hard, and those who are in it for ego or glory don't last. After being among some of the most luminous, brilliant, and hardworking people on the planet for a week, it was clear this was the population I most wanted to serve. So, I pivoted my firm's focus to global impact. Fast forward, Black Fox Philanthropy is preparing for our 5th OC Global next month, and there are a number of things I've learned over the years navigating the week in Mexico that also carries into other major sector convenings, like the Skoll World Forum among others.

So, Topher Wilkins, the CEO of OC, and I collaborated on this piece to help others navigate the world of OC and other sector convenings to maximize their experience and contribution. It is written in my voice but captures the combined wisdom of decades of navigating social sector and corporate conferences around the globe. Read On!

Maximizing Attendance at Sector Convenings like Opportunity Collaboration, Skoll World Forum, and Others

Industry conferences offer a unique opportunity to connect with others face to face, yet it requires two of our most precious commodities: money and time. As such, you want to ensure that you're maximizing your investment not only in terms of moving your work forward, but also connecting with colleagues who care as deeply as you about a more just, peaceful, and gender-balanced world. Choose well so that you can Be at the Right Place at the Right Time. It's important to know what type of convenings are right for you – in service of your organization and your own professional development. Take the time to do the research, contact the conference organizers, ask your peers for recommendations on which conferences to attend, and use organizations like Conveners.org to more effectively navigate the increasingly complex impact convening landscape.

The first thing to anchor in is ***Know Why You're There***. We often get caught up in the 'zombie zone'; a place where we focus so much on the 'work' needing to get done that we forget WHY we are in the social sector in the first place. What drives you? What was the catalytic moment when you realized you were a social change agent? Our deepest passions often spring from our deepest wounds. What are your firsthand experiences with inequality or injustice that inspired you to bring about change? If we can center around our own purpose amongst peers, if the reason(s) why we're there becomes the foundational linkage with those in the room, then we can more readily achieve the work, more readily share ideas, resources and best practices, more readily forge more effective partnerships and collaborations toward impact.

And while going as your whole self, being clear on your "why", and showing up with the intent to serve is a strong foundation from which to attend, there are some things that you can do prior to, during, and after attending a convening that can help maximize the relationships you develop.

Preparing for the Big Week – The Basics: A few weeks before the convening, go through the attendee list — is anyone who you already know attending? Reach out to them to let them know you're eager to reconnect. Not only will familiar faces offer a certain level of comfort in a new setting, but the people you know may be connected to others you are keen to meet. Do they map to them on LinkedIn? Are they open to an email introduction in advance of the convening to the person who hopes to meet? Do they have ideas of people they feel you should know that may not be on your radar? And, how can you help them to be effective at the convening?

Use the attendee list to identify the key people with whom you would like to have a conversation. The conversation should not center around your organization, or even theirs, but who you are as people in the world. Not just what you do, but why. Make yourself and your organization stand out by introducing yourself with your purpose, not your organization. For example, "I'm Natalie Rekstad. I work with global nonprofits to help them attract the funds they need to do their work in the world." This can inspire a very different type of conversation, inviting a deeper connection around how and why you do the work you do, and vice versa. As you enter the conversation, have the mindset of collaborating to move each other's (or simply the other's) work forward, a hallmark of the OC ethos.

For those with whom you are specifically hoping to connect, be prepared with an opener that is specific to that person. For example, "I'm thrilled that you're here because one of the things I've admired about your work is your approach to X. How did you arrive at that approach?" or "What is it in your personal story that would lead you to do this specific work in the world around X?" This will help begin a conversation, but also put the other person at ease a bit, knowing that you recognize their work and are interested in learning more about their journey.

That leads to the next point: Be Authentic. Leave your ego at the door and approach time with your peers with as much humility as possible, truly showing up as the passionate change agent that you are. Be open, evocative, and curious. Share your passion with personal stories – the highs and the lows of your work. Make it personal. Make it real. It's an open secret that funders know when they're being viewed as a walking dollar sig. Nothing is more off-putting.

Something that dovetails with authenticity is to Mean What You Say. Follow through on your commitments. Carve out time during or after the convening to send those emails you promised, schedule calls with the folks you met, make yourself accountable to continue the conversations. On that note, remembering every interaction is difficult. So, after each conversation, take notes so that you can personalize your follow up in a meaningful way.

Listen. We've all learned the essentials of communication in our younger years. It's time to sit in a circle, practice good listenership, and share well with others. Find out all you can about the person sitting across from you in that moment, and share with them as well, but make it organic. Active listening, not pitching, is the pathway to deeper engagement for both sides. This Stanford Social Innovation Review article captures it well: The Pitch is Dead. Long Live the Conversation.

Let the Merit of the Work you do be your North Star. My latest jag is on the funder-grantee dynamic and the story we tell ourselves about power. I listened in on a session recently that was meant to help NGO leaders be more effective fundraisers. It was centered around role-playing with the mock-funder exploiting a position of power, putting the NGO leader in the position of having to force their points/value. As a funder, this horrified me, but it also made me realize how important mindset is when we begin conversations around change. The reality is, we are all bringing something valuable to the table to solve a common vision of change. Being in the trenches is noble and vital, as is committing hard-earned financial resources to fund change. Make no mistake – this is an equal partnership rooted in a shared vision for a better world. When we enter into a conversation from a position of feeling "less than", we are the ones creating that dynamic, and the truth is, most funders want no part in participating in that dynamic. If anything, we have unbounded reverence and respect for the work of those who are brilliant, brave, and gritty enough to be on the front lines (because most of us are not). So please approach us as the equals that you are. Own your worth, take your full space in the room and in the world. We need you as much as you need us.

Ask, *"How can I help you? How can we help each other?"* At Opportunity Collaboration, these questions are the foundation of the on-site culture. All too often, we approach professional networking opportunities prepared with an arsenal of ways others can help us. We bombard others with requests, with asks, prioritizing our own organizational health potentially to the detriment of the larger mission. We thereby create a culture rooted in transaction, extraction and one-sided relationships. But it's simple…the more you give, the more you get. And in the end, are we not striving for a world where everyone is a contributor, where everyone has a piece of the puzzle, and where we all are considered equals able and willing to assist one another in pursuit of social good? This may seem easier said than done in light of the pressures placed upon you by your board and others. We hear this over and over: "It is a huge investment to send me to this conference; I have to return with funding!" We know that conferences are meant to produce tangible results, which is naturally anxiety-producing. But operating from this place of pressure and scarcity is already putting you at a disadvantage.

May we recommend a mindset shift to one of generosity? One of the things I do before heading to a convening where I'll be conducting training sessions and hoping to meet NGOs we can serve through our work at Black Fox Philanthropy, is to Anchor in Intentions. I live in Boulder County, Colorado (one of the woo-woo capitals of the US) so give me a hall pass here, but I literally get clear on the outcomes I hope to achieve in advance, then do a visualization where this comes to life. Then every morning at the conference I spend five minutes in prayer around those intentions — but where my knees buckle is when I get to the part where I ask that "I go where I am needed most today", and I express gratitude for the privilege to serve this community. I have found that throughout the day, having anchored in that heart-centered space of service is prayer in motion. As a result, I have deeper experiences with those I connect with during the day.

Protect the Asset. Here's what we know: People who work in this sector work HARD, especially those who are "boots on the ground", the strategic funders, and those of us who are in the role of supporting those efforts. Why? Because it matters. It matters very much how we show up in our work and lives to bring about real change. But it also matters that we "Protect the Asset" (you are the Asset). Take time for a walk on the beach, do yoga, get a massage, have late night drinks with people you enjoy, not people with whom you think you "should be networking". The upside? OC's famous serendipity. I cannot tell you how many extraordinary relationships and experiences have arisen from hanging out on the beach or the pool, or just having a random conversation about gardening with someone who later turns out to be a giant in the sector (and an amazing new friend). May we suggest attending Black Fox Philanthropy's 4th Annual "Collaboration Cocktails" at the Jade Pool on Monday evening??

I love the Buddhist saying: "After the Ecstasy, the Laundry." After the high of a convening like OC, it's time to hunker down and follow up with the connections you've made as soon as you can. Draft as many of the emails you can on the flight home, even if it's only a couple of lines. I recently returned from the Women Moving Millions Summit in Seattle and wrote to select people I connected with variations of this missive: "Amazing to be with you at the Summit but we didn't get enough time together! I'm on the plane home with both a heavy heart — for the staggering issues discussed during the summit — and a heart full of hope for all of the brilliant and passionate leaders working to solve them. Including you." (Only ever write something like "including you" if it is 100% authentic and from the heart.). The point is to get started on developing those hard-earned connections and new friendships as soon as possible, making them the priority that they are. Once we get home and are swept up into the day-to-day of our lives, the odds of reaching out in personal and meaningful ways goes down dramatically.

In closing, pack your business cards, your intentions, the stories of "why" this work is uniquely yours to do, and the heart of service that brought you to this sector in the first place. You will be rewarded with deeper and more meaningful interactions that can translate into moving your work forward. We hope to see you at Opportunity Collaboration Global next month!

BUILDING A FUNDRAISING BOARD | RECRUITING AND ON-BOARDING NEW BOARD MEMBERS

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

When it comes to their boards, nonprofits are faced with a double-sided sword. Among the various leadership qualities of a successful board, fundraising is critical. For an organization to achieve its full impact, it's vitally important that every board member is committed to fundraising. On the other side, board members may feel pressured to constantly fundraise. Volunteer boards are often filled with people who have a passion for the organization's mission but are put off by the idea of fundraising. These board members might not have the right skills, understanding, and mindset. Often, the executive director is left to be the primary fundraiser and may be stretched too thinly to be fully effective on their own, leading to burnout and failure.

How do you then save your nonprofit and board from this quagmire? By creating a culture of success by recruiting members who can be effective, then giving them the tools to be successful. Nonprofits need to create a board culture of leadership with clear expectations and objectives around their role in achieving sustained success, especially when it comes to raising funds. These people understand that the stakes are high for the nonprofit's ability to meet its mission, thrive and, in some cases, survive.

Set the expectation that fundraising is a priority and let board members know they will be supported in their success. The chair should be leading by example, as well. Make fundraising a part of the formal responsibilities of the board and include it in an annual orientation, ideally with some skills-building training. Have them agree to a "give or get or get off" practice. The amount shouldn't be dictated by the staff, but the board members should have a clear understanding upon taking their position that they'll either be donating themselves (give) or raising an equivalent amount (ideally both giving and getting) for maximum contributions.

Do this by establishing a board donation policy that shows a high level of compliance and by asking passive members to resign or opt into an advisory role. Have the board draft the contract and sign it every year so the expectations are clearly understood and will stay in the top of their minds. In the contract, the board can specify allowances for members who can contribute professional resources like political connections or legal or communication services. If you have members who don't comply, discreetly ask them about any special circumstance that prevents them from contributing.

It is important to also understand that many board members don't identify as fundraisers and prefer to hide under the table when fundraising conversations begin.

Black Fox Philanthropy has developed the Board Self-ID to help board members ask the right question at the outset: Not "Am I a fundraiser?" but instead "HOW am I a fundraiser? Am I a Nurturer, Asker, or Connector?" This enables the board member to identify as a fundraiser and then take in the training with a more open mind.

For example, the Nurturer personality has a powerful role to play in fundraising because there is gold in loving your existing funders. Use the Board Self-ID tool to determine how to support your respective board members in a way that is optimal for each member. Quarterback these valuable board members in a way that is unique to their skills and personality type but don't be afraid to ask them to stretch. A great example of how important Nurturers are as fundraisers are shown in Donor-Centered Fundraising. Penelope Burk reported that survey participants were asked how a thank you call from a board member would impact their future giving. She found that:

- 93% said they would definitely or probably give again when they were asked
- 84% would give a larger gift
- 74% would give indefinitely

When asking board members to stretch a bit outside of their comfort zones, they must first recognize that board service is a calling which means we have to grow into them. At the outset, we don't have everything we need to fulfill the calling — the calling asks of us to expand, to stretch, to challenge our comfort zones to be as effective as possible. And when it comes to fundraising, many board members feel uncomfortable asking their networks to join them in a journey toward impact. But the "North Star" question every board member should ask themselves is "What does the organization need?" Then they should do what is required to fulfill that need, which can mean going into uncomfortable territory around fundraising.

To help support board members in their sacred duty as fundraisers, we've developed a companion guide to the Board Self-ID called "The Art of Engaging Your Networks." It is downloadable in Word format so that you can tailor it to your organization. My only ask is that you cite the source.

At his 2014 San Francisco conference, "The Nonprofit Boot Camp," James Lee, the managing partner at Schaffer & Combs, spoke about the culture of a high-performing board, including their involvement in fundraising. He shared, "Expectations can be a murky pool regarding board involvement, and the sooner members know what is expected of them, the better. This serves both to avoid misalignment as well as ideally enhance loyalty and performance. So creating clear expectations in key areas such as the time members are expected to commit, the money they should contribute – which doesn't have to be straight giving, but can be through a give-or-get policy – and what defines their successful participation is important. Board contracts and job descriptions are methods for avoiding awkward conversations. But either way, don't be scared to be clear with members. They will appreciate not having to deal in guesswork."

How do you recruit the right board members with fundraising in mind? Eliza Huleatt, vice president of CCS, suggested having potential board members volunteer within your organization first. They'll have an insider view of your philanthropy and you can get to know them and see how they work.

Volunteers who already support your nonprofit and attend events regularly are prime candidates. This way, you can also find members who are comfortable with fundraising. Seek them out by offering a fundraising orientation and education among your volunteer activities. This will also help train your board members to ensure they're delivering the right message and building their confidence in seeking funds.

Joe Garecht, the founder of "The Non-Profit Fundraising Digest," also insists that fundraising is key for an effective board but acknowledges that board members are often stymied by the pressure of fundraising. He offers five ways for members to help in fundraising that isn't asking for money. They include hosting non-ask events; making thank you calls to donors; asking prospective donors for advice; teaching them how to be an ambassador for your organization and putting them in charge of overseeing your nonprofit's development program.

Relieve the awkwardness and stress of asking for donations by investing in orientation and on-boarding. The training should give them the proper language and etiquette to use, not only for asking for funds but how to field questions and objections they'll encounter. Scripts, role-playing, and games acting out various scenarios can be of great assistance. Also ensure your members have tools like a volunteer handbook, contacts sheets, frequently asked questions, brochures, etc. These practices will also give your members the confidence in their fundraising tasks and ensure they feel supported by the organization.

Another factor to consider in building a healthy board is the understanding that the culture and processes of the board itself are as important as what it does. The Bridgespan Group cites that oversight isn't as necessary as leadership activities and improving performance is more challenging than strengthening various areas. Clarity about the role of the board can help with that.

The Council of Non-Profits has a list of links for self-assessment tools that can assist boards for measuring their own effectiveness. Also helpful in examining your board is BoardSource's "Five Things Your Board Can Do to Lead with Accountability and

Transparency," including the necessity of board members to personally donate to your nonprofit as an example of leading with authenticity.

By giving board members the tools they need to be effective fundraisers, you'll help them contribute in meaningful ways that translates into vital funding for your mission.

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BOARD SELF-IDENTIFICATION EXERCISE | THE ART OF ENGAGING YOUR NETWORKS

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

A core ingredient in developing a successful fundraising board is for each member to identify, ***not if, but how they are a fundraiser:*** **Asker, Connector, or Nurturer**. Gaining clarity around a dominant type enables them to stretch the boundaries of their comfort zone without going completely into unnatural territory. This also enables the development staff to quarterback the Board most effectively in roles that maximize their unique strengths. We've developed a system by which Board Members self-identify their fundraising style via the Self-ID exercise featured here.

Name:

SELF-IDENTIFICATION EXERCISE ~ BOARD ROLE

Rate how you identify with each role in order of one through three, one being your most dominant type, three being your least dominant type.

_____Asker - Making the Ask

Personality: Self-assured, charming, success-oriented, resourceful, assertive, and decisive. May show preference for extroversion.
At Your Best: Self-accepting, authentic, charitable, role models who inspire others. You believe in yourself and your own value. You have a resourceful, "can do" attitude and passionate inner drive. ***Examples:*** Madonna, Oprah Winfrey, Bill Clinton, Condoleeza Rice, Martin Luther King, Jr.

_____ Connector - Opening the Door/Making an Introduction

Personality: Optimistic, versatile, playful, and practical. You pursue what you want in life with a cheerful determination. You are frequently endowed with a quick, agile mind, and can be an exceptionally fast learner. May show preference for extroversion or adapted introversion.
At Your Best: You focus your talents on worthwhile goals, cross-fertilizing areas of interest. ***Examples:*** The Dalai Lama, Benjamin Franklin, John F. Kennedy, Amelia Earhart, Timothy Leary, Bette Midler

_____ Nurturer - Stewardship

Personality: Empathetic, sincere, warm-hearted, and friendly. You are encouraging, nurturing, appreciative, able to see the good in others ~ a truly loving person. You feel it is a privilege to be in the lives of others. May show preference for Introversion.
At Your Best: Unselfish and altruistic, have unconditional love for others. You are deeply unselfish, humble, and altruistic.
Examples: Guru Ammaji ("The Hugging Saint"), Bishop Desmond Tutu, Danny Glover, Eleanor Roosevelt, Ann Landers, Gone with the Wind's "Melanie Hamilton Wilkes"

Extrapolated from Enneagram and Meyers-Briggs Personality Types
Developed by Black Fox Philanthropy, LLC

Further, Black Fox Philanthropy has developed **Openers and Asks** that are suited to each type of fundraiser; however, note that each of us are all three types but have a dominant type that is our "Zone of Genius." Because we are varying degrees of all types, you can pull from each of the Openers and Asks if they more resonate with your personality.

It is also important to note that the span of time from the Opener to the Ask could be short, within one meeting, or it may take several conversations and months for the timing to be right for an informed* ask.

ASKERS: Asset in key funder meetings, particularly with High Net Worth (HNW). Leverage a Peer-to-Peer mindset. Should familiarize self with "Leading the Donor Dance" to ensure funder is doing 70% of the talking. Pair well with Nurturers, but forthrightness should be balanced with Nurturer strengths of nurturing the relationship.

The Opener:

"What originally drew me to this work is X. I can't help but notice you have a similar mindset around (your issue area or whatever is true for that person and you that ties in your mission). There's a lot at stake, and I think there is something there worth exploring — are you up for a lunch in the coming weeks?"

"My core belief is that the future hinges upon a more just and gender balanced world. I'm doing what I can to bring this to life within our lifetimes and I'd love to talk with you about what that looks like."

The Ask:

"If I were to ask you to make a transformational gift of $X, what would you need to know to say yes?"

"I invite you to join me on this journey by joining the Impact Circle, a community of our most engaged members. Funding gender equality at this level is a real stake in the ground - $X level for 3 years. Will you join us?" (Fall silent and await a response.)

CONNECTORS: Hosting gatherings for the organization, assembling host committee for larger gatherings. Putting people and ingredients in place for optimal outcome.

Bringing enthusiasm to conversations about your organization and its mission, drawing people in with passion and vision.

The Opener:

"I've been on this powerful journey with DFW and its been transformative. I was in a conversation with the Founder/Board Chair the other day (or in a board meeting) discussing X, and I thought of you because…X."

The Ask:

Your mission is serious, but you can still be playful if it fits your personality: "I sincerely think that being part of the Impact Circle (or other giving name/level) could be a powerful journey for you as well. I will be inconsolable if you don't say yes to meeting with the Founder and me and discussing the power of the Impact Circle toward our shared vision of (your issue area)."

"I hold a vision — and (org) holds the key to realizing this vision — of a day when all women are given equal opportunities to thrive within our lifetimes (insert your mission). I'd like to connect you to the Founder to see if this is something you could also help bring about. Can I set that up for the two of you in the coming weeks?"

NURTURERS: Generally, hide under the table during fundraising conversations, however: very heart-centered, great stewards of existing relationships. The truth is there is a lot of funding in loving your donors. Expanding network of your organization via deepening relationships with existing funders (increasing funding), encouraging existing supporters to open their networks with "soft ask". If there is great discomfort in making any form of ask, name it. "This is the part that makes me very uncomfortable, but it's the most sacred part of my role on the board. So, I'm going to take a deep breath and do it anyway."

The Opener:

Sharing the story of your organization with their own networks in a heart-centered way, and/or sharing their "why" the work is personally significant.
"We just came off of an amazing board retreat and I'm deeply moved by the stories of transformation. Can I tell you some stories of impact that have touched my heart, and are changing so many lives including my own?"

I just had a conversation with a fellow board member/Founder/other about this work, and a light bulb went off for me around why this matters so deeply to me personally, and why it matters on a global scale. I'm eager to share some insights — Would you be open to a conversation over lunch?"

The Ask:

"What would it need to look like for you to join me in bringing about gender equality in our lifetimes (insert your mission)?"

"I would love to invite you to join us, but I'm not sure where to go next in terms of making a financial ask. The minimum for joining the Impact Circle is $10,000 per year for 3 years. Based upon all we've discussed, where do you see yourself?"
* Ideally informed by the funder. Refer to Leading the Donor Dance or Strengthening Funder Relationships to uncover the funder's connection to your mission.

ROADMAP TO LAUNCHING A POWERFUL & EFFECTIVE MAJOR GIFTS PROGRAM

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

As we continue through 2020 in times of increased uncertainty, nonprofit organizations are taking a good look at their long-term sustainability when it comes to securing and increasing funding. With increased competition for both foundation and major donor funds during the COVID-19 pandemic, now more than ever we are seeing the real value of sustainable major giving programs.

That's why in our latest resource, we'll examine:

1. Why major giving is so important
2. What questions you should be asking at your organization before embarking on a Major Gifts program
3. A sample program design and timeline for implementing a Major Gifts program
4. How to recognize your major donors & recommendations for printed collateral
5. A spotlight on a unique type of major giving: multi-year unrestricted funding

Recognizing that less-resourced NGOs can't afford to engage our fundraising services, one of the ways Black Fox Philanthropy serves the social sector is to be open-source on much of the content we've developed. We regularly release this content via our blog, and today is another one of those days!

We strive to be as open-source as possible with the content we develop. As with our other blog posts, we enable a 'plug and play' approach with these resources, accessible to everyone, from the novice fundraiser to the most experienced. Please feel free to download a copy and use it to enhance your organization's strategy.

1) Why is major giving so important?

The gold in launching a major gifts circle among individual funders is manifold. It deepens funder engagement through building community with the organization's leadership and other mission-aligned funding partners; members ideally play a role as thought partners and ambassadors, introducing the organization to their networks; and in many cases the program serves as a pipeline to a board role. The infrastructure also supports the ability to steward a larger number of partners in a meaningful way, creating more capacity to pursue and engage more funding relationships.

Each organization sets its own level for defining a major gift, whether that is $1,000 or $50,000. This depends upon the existing funder base of the organization, its unrestricted funding needs, and the capacity to deploy a formal Major Gifts program. While existing supporters can be engaged in a formal Major Gifts program

within a short time-frame, the cultivation cycle with new relationships tends to be between 6
-18 months, and occasionally longer ("Relationships move at the speed of trust.").

2) Initial questions and considerations before establishing a Major Gifts program

Developing and launching a successful Major Gifts program is a significant organizational investment, and readiness and bandwidth are key indicators of program success. We encourage organizations to consider key points before embarking upon a Major Gifts program.

Have you considered your overall organizational readiness for implementing a formal Major Gifts program? This includes looking at areas such as:

- Your proven theory of change
- Your monitoring & evaluation processes, as well as ensuring you have a proven track record to show donors
- Strong Leadership
- Capacity to Responsibly Absorb and Deploy Funding

Be clear about your goals and objectives for implementing a Major Gifts program, including setting out short and long term funding goals. Setting out clear intentions ahead of implementing your program will ensure you stay on track, so it's essential to ask questions such as:

1. What proportion of this is unrestricted funding? (overhead, research & development, scale)
2. Will you have goals around securing multi-year pledges?
3. Do you intend to develop a planned giving pipeline alongside your program?

Look inward. Is there a core group of existing funders who have the capacity and inclination to deepen their engagement with your organization? Upgrading existing supporters to higher levels of giving will be instrumental in developing your successful Major Gifts program. Consider grandfathering them in to gain early "wins" and provide an opportunity to increase their giving. The key here is building community among funders and bringing them closer to the organization.

Your Organization's Feasibility Checklist

Develop your funder profiles. This should include 8 - 10 deep dive conversations — modifying "Strengthening Funder Relationships" for purpose of uncovering, among other things, potential interest in being early adopters of a Major Gifts program and serving on a launch committee. For all funder candidates we've developed this BFP Major Gifts Prospect Rating Form for your use.

1. **Conduct a data/wealth screen.** How many and who are the core group of funders who have the capacity to deepen their engagement with your organization?

2. **Be clear about your leadership**. Will the 'ask' be coming from your Founder, your Executive Director, or a Major Gifts Officer? Will this person be quarterbacked or is it up to them to initiate and close? Make sure you assess how realistic your chosen structure is from start to finish.

3. **Determine your staff capacity.** Does your staff have the bandwidth and skillset to design a program and execute it independently, including stewarding a large number of supporters in a time-efficient way? Or does your organization have the financial resources to invest in a third-party consultant to design and co-pilot a roll out? If your staff will be executing independently, make sure they have the time and skills to develop materials (including letters and pledge forms), set up appointments, conduct meetings and make the ask, as well as follow up afterwards.

4. **Outline your organization's time investment.** We would advise the following:

    a. Four to Six-Month Quiet Phase/Advance work: 12 - 16 hours per week
    b. 12-Month Public Facing: 8 - 10 hours per week
    c. Ongoing: 5 - 8 hours per week unless a field visit year

5. Conduct a skillsets inventory. Who will be responsible for the following?

- Pitch Materials Development and suite of Letters/Pledge Form
- Advancement/Setting up Appointments
- Conducting Meetings/Making the Ask/Follow up
- Event Planning/Execution
- Stewardship

6. **Board Buy-In.** Is your board willing and able to bring in key contacts, host cultivation events with targeted invites from their networks, and cultivate existing funders to higher levels of giving?

7. **Lost Opportunity Evaluation.** Make sure you are weighing the advantages and disadvantages - a 'lost opportunity cost' of investing this time and resource into the creation and launch of a Major Gifts program.

3) Program design and sample timeline

On the next page is a sample design of what the first year of your Major Gifts program might look like. Note this timeline is based upon a calendar year for example purposes only. Modify to your organizational/timeline needs.

January/February	Funder profile calls/meetings (pulled from "Strengthening Funder Relationships" guide). Develop program name candidates (Visionary Society, Ripple Effect, etc.) . Sketch out elements of the program - should be informed by funder profiles (will evolve). Decide if you will employ a committee structure. (If so, added duties to be included in this workplan/timeline.) Board buy-in on elements & structure. Identify top 30 prospects with a focus upon lowest hanging fruit/early adopter candidates. Segmented by priority and determine who is reaching out to whom. Assign roles and responsibilities of team members. Identify need for new hires, if any. Engagement materials first draft (benefits, value proposition, compelling narrative). Materials Checklist: One-pager "Case for Support" specific to Major Gifts Pitch Deck as tool for overarching narrative of organization and to make the case for unrestricted funding (optional) Invitation Letter (segmented based upon funder level) Pledge Form Thank you/Acknowledgement Letter Schedule Major-gifts focused board fundraising retreat, including Calls to Action (reaching out to networks, hosting gatherings, Board member point-person on MG program for peer-to-peer mobilization, who accompany on cultivation meetings, etc.)

March	All engagement materials/messaging funder-facing (but will evolve). Suite of letters/pledge form completed Set up MG-focused meetings with inner circle high level existing supporters to discuss upcoming quiet phase. Identify/select other prospects for outreach/meetings from wealth screen/connections made/other.
April/June	Quiet Phase Commences. Set up & execute meetings; tight follow up. Gather MG candidate names from inner circle meetings ("Who else cares as deeply as we do about ___ - or could care as deeply - should know about this?") Board retreat (or at least dedicated segment of existing board meeting) to take place. Call to Action for board/engaging networks. Board to review short-list of organization prospects for connectivity. Board mobilized/quarterbacking board/tracking.

July	Ongoing set up & execution of meetings. Board continuously mobilized and financial goal for quiet phase emphasized. Convey palpable excitement toward public launch with all.
August/early Sept.	Send "save the date" for launch event to Founders Circle members and candidates on the fence. Plan format, logistics, key speaker(s) for launch event. Convey sense of urgency for enrollment for Founders Circle candidates before the public launch. Invitations to launch sent.
Late September Public Launch	LAUNCH GATHERING/Financial goal for quiet phase met/celebration. MG goes live on website & general communications. Founders Circle e-communications sent - celebration and a look to the future of MG - "Because of you…" (Delineate impact.)

October/November/ December	Incorporate MG engagement opportunity into year-end renewal discussions. Stewardship plan (ever-evolving) created and year-end elements deployed. Final push for December 31 deadline to join MG.
January/February (following year)	Stewardship Calendar finalized, including community building & cultivation gathering(s). Trip to the field considerations (yes/no? Annual, bi-annual?) Ongoing cultivation of new MG members.
Spring	Assess MG strengths, challenges, future changes/refinements, and ongoing expansion. Ongoing stewardship/member cultivation. If applicable, beginning field visit planning.

4) How to recognize your major donors

Recognition and benefits should be low-cost to the organization and be designed to further connect funders to the work; i.e. newsletter, beneficiary stories from the field, formal recognition opportunities, periodic gatherings, and travel to the field paid for by participants. To some extent, the benefits should map to the giving level of the Major Gifts program; however, this needn't always be the case if the overall culture of your funder base is fiercely mission-focused.

Recognition and Benefits examples follow:

- Ultimate "insider access" to organization leadership and general events
- Special Major Gifts-focused events for members in key geographies
- Special recognition in publications (annual report, website, newsletter)
- Personalized contact with beneficiaries (letters/video clips from those helped by non-profit, etc.)
- Insider communications, including from the field
- Access to/thought partnership with ED/Founder
- Unique travel opportunities (annual? Bi-annual?) Members would pay for trip costs, but a trip like this would provide "ultimate insider" access while strengthening funder relation-ships.
- Creation of branded collateral, such as holiday cards, and/or a feature in the Annual Report and website and social media
- Recognition system for long-term members for key anniversaries.
- Flexible giving options (stock, bitcoin, planned giving, etc.)
- First look at research and reports produced by organization
- Exclusive group conference calls and webinars with organization leadership
- Serve as ambassadors and advocates to further the mission of the organization
- Be in community with like-minded global citizens

Recommendations for printed collateral

Strong printed collateral is an essential component to an effective program. Here are our top recommendations to ensure success.

- The marketing piece complements the in-person conversation and shouldn't be over-the-top, as that can be off-putting to many funders who are mindful of overhead expenses. You want to create an exclusive feel but do so elegantly – less is more in this case.
- We recommend using an unusual size to set the Major Gifts program apart from other organization materials – this is a unique invitation. A square conveys

quality and class. 9" x 9" folded or tri-fold (meaning what the cover is 9" x 9" not folded down to a smaller size), depending upon the number of images.

- Paper stock matters. You'll want a thick, high-end feel for this high-end group. 100# dull matte cover stock, or 120# for example.
- The images for the piece should be an invitation to connection – on some level we'd like for candidates to see themselves reflected in the piece.
- The text should be easy to read and play off of the images. Do you have a set font you always use? Be consistent.
- An expanded "Case for Support" can be created in telling the overarching story of the organization within the Major Gifts program. This wouldn't be a printed piece but more of a pitch deck format that can be used as a framework for an in-person narrative/ask, but also can be emailed.

5) Spotlight on securing multi-year unrestricted major gifts

Prepared by Julie Cullings, Business Manager, Black Fox Philanthropy, B Corp

For the final section of this resource, we'll focus on a rare but important type of funding: multi-year unrestricted gifts. Securing multi-year unrestricted major gifts should be high on the list of your Major Gifts program's key objectives. Although this type of funding can be challenging to come by, it provides a high level of flexibility and security for your organization, despite the steep competition.

Unrestricted funding allows organizations to grow in whatever capacity is most needed, including improving their infrastructure, supporting operations, or simply allowing the organization to be nimble to respond in times of crisis or a quickly changing philanthropic landscape, like what we are currently seeing during the COVID-19 crisis.

Multi-year funding also allows organizations to make tangible, long-term plans. Organizations can feel comfortable to see their projects through to completion. Instead of worrying about where their next wave of funding is coming from, they can be wholly focused on maximizing impact.

When funding is both multi-year and unrestricted, the impact on your organization's capacity is exponential. Furthermore, securing a multi-year unrestricted gift from a major donor is even more appealing. A recent study from the Center for Effective Philanthropy found that two-thirds of nonprofit leaders would prefer to receive more funding from major donors versus foundations, which tends to require less reporting and frees up more staff time. Additionally Foundation grant priorities can change, whereas individual donors are likely to remain passionate about the same causes and interests over a long period of time.

However, multi-year unrestricted funding can be hard to come by from both foundation funders and individual donors, which is why our focus for this section is helping you **explore unique approaches** to securing these rare gifts.

Approaches to securing multi-year unrestricted gifts

Beyond the tried and true approaches of persistence and forging strong relationships with foundation and individual donors, which we go in-depth on in our Leading the Donor Dance and Strengthening Funder Relationships resources, what other approaches can your organization utilize to secure multi-year unrestricted funding?

Establish Clear and Responsive Communications with Individual Donors

Part of the reason why securing multi-year unrestricted funding is so difficult, especially among individual donors, is because some do not fully realize why this type of support is needed. Individual major donors need to better understand the work that your organization does, including all of your complexities and challenges. Instead of data-driven impact reports, storytelling with passion and authenticity should be at the heart of your communications with donors. Casting your donor as the hero of that story and finding how you share the same vision will facilitate deep and sustainable alliances with donors. When a donor sees and resonates with your organization's long-term goals, they are more likely to commit to longer term gifts, as well as trust you with those funds to deliver. Retaining that trust through strong, responsive communication (including discovering their communication method of choice and sticking to it) and transparency will be key to securing repeat gifts.

Retain Talented Major Gift Officers

We know that relationships are at the core of what connects donors to nonprofits, and the major gift officer is often the face of that relationship. Officers who can appreciate and understand the organization's mission and the donor's interests, listen and ask the right questions, respect the timing and patience involved in the asking process, and lead with a heart-centered focus are valuable, especially in terms of securing multi-year, unrestricted funding. **This value increases when an officer stays in a role for three to six years.**

However, retaining top talent is easier said than done! With development professionals often changing jobs every 1-2 years, competition can become fierce. Not only is the relationship with the donor and gift officer incredibly important, but departures from your organization may send damaging signals to donors. To prioritize retaining top major gift officers, Ronald Schiller, Founding Partner of the Aspen Leadership Group and the Philanthropy Career Network, recommends that organizations view talent retention in the same vein as the organization views donor cultivation. To do this, Schiller recommends nonprofit leaders add a regular agenda item to discuss "top performers and rising stars" in senior development leadership meetings to keep retention at the forefront.

Explore and Seek Funding from Giving Circles

Another alternative to seeking individual major gifts and foundation funding, and perhaps a happy medium to those options, is giving circles. A giving circle is a group of individuals who each donate a specific amount of money. The total collection of funds is then distributed to an organization or cause that is decided upon collectively by the group members.

Giving circles often offer grant opportunities that do not exist in the realm of foundation funders. This is especially important for nonprofits with a specific or unique focus that may be precluded from mainstream grant opportunities. Perhaps most importantly, larger giving circles make more strategic gifts, including multi-year and operational expense funding.

So how can your organization engage giving circles? Many giving circles can be found on Google, but also be sure to check with Board members or existing donors to see if they belong to or have connections with any circles that might be a good fit. Once the giving circle is selected, nonprofits must make an ask, whether it be a formal application or a less formal inquiry depending on the requirements of the specific circle.

Though obtaining multi-year, unrestricted funding is no doubt a challenging endeavor, nonprofit organizations can take comfort in knowing there are additional steps they can take to increase their chances of securing these rare gifts.

We wish you great success in your pursuit of major gifts funders who help bolster the delivery of your vital mission. For more insights, we also love this Major Gifts Guide from Salsa Labs.

PULLING BACK THE VEIL | TOP FIVE THINGS GRANTEES AND FUNDERS WISH THE OTHER KNEW

Prepared by Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp & Michele Dilworth, Senior Director of Partnerships | Candid.org

Black Fox Philanthropy and Candid (formerly Foundation Center, which combined with GuideStar to form a brand-new organization) co-hosted a gathering for capacity building partners and NGOs at Opportunity Collaboration. Why? We had a burning question for the Funder and NGO attendees that could help clear a path to stronger alliances and greater impact:

"What do you wish each other knew that would make a difference in your relationships, how you do your work in the world and the impact you are having?"

The following is paraphrased but essentially in their own words without Candid or Black Fox Philanthropy commentary. Here's what we learned:

FUNDER PERSPECTIVE

What I wish NGO Grantees or Potential Grantees Knew

1. Treat Us Like Equals. Too often, NGOs believe we have all the power in the relationship and come to funding conversations from a place of inferiority. The truth is that most of us view our grantees as true partners in our shared pursuit to address an issue we both care about — so treat us as such. Funders need great projects to fund, and great projects need money. Both parties have something of value to offer the other, and both are essential parts of the equation.
2. Make It A Conversation. We don't want to listen to a monologue pitch and then be asked for money at the end. Engage us in a dialogue about the issue at hand, our interests, and about what motivates us to invest in a project or organization. On your part, it may help to stick to the Rule of Three: deliver your three most important messages and leave the rest to a follow-up conversation or written materials. Ultimately, focus on listening and engaging in a real conversation. Be open, be inspiring, invite the funder into your vision for a better tomorrow, and listen to why they care so deeply about solving the issue.
3. "No" May Not Mean No Forever. If we decline to fund your work, it could mean the mission alignment just isn't there and the answer really is "No". On the other hand, it could simply mean that our funds are already allocated for the year or that we may be looking to fund different work for the time being. Don't take a "No" as a criticism of your leadership or your work. Instead, explore if we would be open to your reapplying another time in the future.

It could be that you get a "Yes" two years down the line!

4. Define Success Ahead of Time. Before initiating a conversation, have a very clear understanding of what you want/need as the outcome. A funder will almost never make a high-dollar investment commitment on the spot – particularly after one conversation, so your first ask should not be for funding. Instead, be realistic about your definition of success and instead consider it a win if you are asked to deepen the conversation with a follow-up meeting or to submit a Letter of Inquiry (LOI) or proposal.
5. Above all…Be Authentic! Don't use jargon or too much industry-speak. Use your own words to explain the problem you are trying to solve, and the impact you are having in the communities you serve. Your voice, your story, your impact, your journey…these are the things most funders want to hear during your first interaction. If you capture their attention and touch their heart first, there will likely be a chance later to lay on the data!

NGO PERSPECTIVE

What I wish Funding Partners or Potential Funding Partners Knew

1. Ask Where Your Funds Are Needed Most. Before making any assumptions as to where your money is best invested, ask the organization leader where your funds will have the greatest impact and why.
2. Fund Overhead. Funding operating expenses is a great way to help NGOs shift from being program-centric to systems-centric, which typically leads to sustainability. Keep in mind that part of those overhead costs include the person that you're talking to!
3. Unrestricted Funding Leads to Innovation. Unrestricted funding will fuel your NGO partners' innovation and visioning for greater impact. For organizations that know the nuances of their individual costs well, or the partner whose vision may require creative funding solutions, allowing them to choose where the funds are invested can be transformational.
4. Invest in Leaders, Ideas, and Mentorship. As a funder, you often have a 30,000-foot view of the sector and can help guide newer NGOs through roadblocks your current grantees have previously navigated. Further, the social sector is involved in solving complex problems that don't always respond to traditional funding processes; investing your funding in an up-and-coming organization tells them, "I believe in you." Don't spend so long navel-gazing about your strategic priorities–experiment, invest in ideas and leadership, see what works!
5. Think Holistically. To make a lasting impact, we have to work holistically if the community/context/system is not already in place to support and further our influence. Some NGO leaders work at the grassroots level, and we rely upon

local leadership. We need resources to build our own capacity while the local leaders we serve work on expanding the capacity within their communities. The changes that we all seek can only happen when these smaller NGOs, local leaders, and funders make decisions that influence and support all parties in interconnected ways.

We were thrilled to see that this entreaty showed up on both sides of the conversation – from NGO to Funder and from Funder to NGO. We've gathered insights from our years in the sector beyond what you see here. Contact either one of us for more: Natalie Rekstad, natalie@blackfox.global
Michele Dilworth at michele.dilworth@candid.org

In the meantime: ***Remember Your Value!***

NGOs to Funders: "Your support is absolutely necessary to do this life-changing work. Funders are the lifeblood of NGOs' success and can completely alter the direction of the future."
Funders to NGOs: Re-referencing #1 in the funder section, it is worth restating here: "You are doing the deeply necessary work on the front lines. We need you as much as you need us. Own your worth in interactions with us and treat us as your equals in solving an issue in which we both care deeply."

For more, we recommend Unicorns Unite by Jessamyn Shams-Lau, Jane Leu, and Vu Le. The book is an inside look at how foundations and nonprofits relate today, and how to arrive at a future filled with partnerships grounded in equality, trust, and creativity — partnerships to help us think bigger, bolder, and better about social change.

A BLACK FOX PHILANTHROPY LENS ON HOSTING A SUCCESSFUL JEFFERSONIAN DINNER

By Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Jeffersonian Dinners are an excellent way to engage current and future stakeholders in your mission. However, some are executed better than others. We want to up the odds for success for you, so we've developed this guide for the Black Fox family of NGOs.

We are big believers in Kaizen; if you have something to add/edit from your own experience that would improve this guide, please let us know!

Black Fox Philanthropy was first introduced to Jeffersonian Dinners by Jeffrey Walker at Opportunity Collaboration a number of years ago. Our founder, Natalie Rekstad, has since produced and/or participated in several has seen them executed beautifully and fruitfully, and a couple that were more … unfortunate. To up the odds of success for a Jeffersonian Dinner, a guideline that was created by Jeffrey Walker that can be found here; however, we created a guide that goes a few layers down to be a true step-by-step guide, particularly for the moderators themselves, as this is the key to a successful dinner.

THE JEFFERSONIAN DINNER

Note: The Jeffersonian Dinner format typically has no more than 12 participants; however, we believe that multiple tables who are having similar conversations also works well, particularly as a dinner for the quiet phase or launch of a major gifts program or capital campaign.

Gain Clarity on the Objective of the Gathering

Is the goal of the event to inspire and touch people, and to generate enthusiasm and funding for your mission? Is it to deepen relationships among existing funders with the organization and each other? Overall, the conversation should be about building community and connection, but also to advance your mission in a tangible way. This should map to the profile of your guests and what you want to achieve.

Jeffersonian Dinners as Fundraisers

While Jeffersonian Dinners weren't originally designed to be fundraisers, invite participants to join in your impact journey as funders. This should be a soft ask in a private conversation directly after the dinner or in a follow-up phone call. More on "the ask" at the end of the guide.

Invitation

The invitation plays one of the most important roles by setting a compelling tone for the gathering. Example invitations can be found on our original blog post on the topic here. We like to use Paperless Post to send out invitations, gather RSVP's, and send reminder messages to participants.

Advance Question

Send a thoughtful question in advance on the invitation itself, inviting guests to share a personal reflection that allows them to be seen and heard by all guests. The question should be crafted to elicit personal stories and experiences relevant to the theme and goal of the evening. Note: Know your audience. Some people are more comfortable with "touchy-feely" than others.

The advance question should tie to the organization's mission, but not explicitly. Examples include: "Describe a time when you were given an opportunity that enabled you to fulfill a personal or professional dream" or "What injustice have you witnessed or experienced that inspired you to action? What did you do?"

Select Moderator(s)

Choose a moderator with a deep knowledge of your organization, such as a board member or funder who is a strong ambassador. The moderator should have an engaging style that can stimulate discussion among the guests, keep the conversation moving with great follow-on questions if necessary, and is mindful to include everyone in the discussion.

MODERATOR GUIDE

The objective of the following guide is to give the moderator(s) who are new to Jeffersonian Dinners, a sense of confidence and the tools to be successful. Moderator(s) to anchor in responses to two of the following questions. Responses should touch you on a deep level and make you come alive when sharing. Note that the organization shouldn't be mentioned per se, more the overall issue being addressed by the organization. These "nuggets" are great to use if the conversation wanes, and can serve as an invitation to others to chime in. In short, why is this uniquely yours to do?

1. Example: Poverty alleviation is personally significant to me because… (experienced poverty first-hand, had a fortunate life & want to pay forward, etc.).

Expound upon the answer in an authentic and vulnerable way – this creates sacred space for others to share "why" they care about bringing about prosperity for those in need (or whatever org issue area is).

2. (Organization issue area) is personally significant to me because… (Our deepest passions often spring from our deepest wounds. If true for you then be brave/vulnerable enough to go there).
3. What originally drew me to (organization issue area) was a deep frustration around…
4. What was most exciting/interesting for me in the early days of my journey in this work is….. What's most exciting/interesting now is…
5. The stories (or story) of our impact and/or hope that most touch my heart are…
6. What I feel is at stake if we don't address (organization issue area) is …

Setting the Stage

The moderator sets the tone for the table through modeling behaviors such as active listening, relaxed manner, eager attention to each guest, demonstrating vulnerability making it safe for all to go to deeper levels. Above all, be your authentic self and have fun! This is a night of connection, conversation, and community, and serves the powerful mission of your organization.

The conversation can unfold in thoughtful ways through a series of questions that encourages the participants to share their hearts, minds, and visions around creating a world they'd like to see in the future. Everything that is said should be directed to the entire group, so no 1:1 side conversations. Not everyone needs to respond to each question – some may chime in; others may choose not to. The style of conversation should be organic, and "popcorn" style, with the Moderator inviting input from those who are quieter. It's about connection so everyone should have a chance to be seen and heard. The conversation can be dynamic through asking the questions in a "leaning in" way and with "active listening". The conversation should move at a nice clip but in a relaxed way and should follow the passion of participants while utilizing the following examples questions to keep the conversation on point.

Chances are high that the conversation will flow freely and energetically, and you won't get to ask all questions. In fact, you may only get to two or three! Determine in advance which questions you most want to cover during the dinner, being sure to tie in at least one about the organization at the end. Try to keep the conversation on track with the questions, but if the conversation is on fire and is on point (tying in organization/issue area/philanthropy in some way), then use your judgement on keeping it on a set track with questions or to let the conversation flow as is as long as it relates to the organization enough to flow easily into the closing remarks. The questions are meant to keep the conversation flowing and keep participants on point.

Let the Jeffersonian Dinner Begin!

Host Opening Remarks

The host may be the person in whose home the Jeffersonian Dinner is taking place or other location such as a restaurant. The host should be someone other than the organization leader who will be making any unifying closing remarks and/or an ask. The host should share that a core theme of Jeffersonian Dinners is coming together as people (not partisan, with an agenda, etc.), discovering our common humanity, and building community over a meal, lovely wines, and a shared interest or passion. While you may choose to describe what a Jeffersonian Dinner is on the invitation, you can also pull in fun facts about the original dinners hosted by Thomas Jefferson, invoking the man himself. More information can be found in this link.
We also suggest setting the stage for the conversation around your mission with a quote by Jefferson: *"I like the dreams of the future better than the history of the past."*

At the Table

Moderator to welcome everyone, share their name, where they are from — and share your response from one of the questions above around why supporting the mission of the organization is uniquely yours to do.
Then clockwise ask that all introduce themselves briefly and say where they grew up.
From there – counterclockwise – have everyone share their story based upon the advance question. Example advance questions shared above under "Advance Question."
All questions after this initial one are to be responded to organically, not in turns.

Questions to Keep Conversation Moving

(Select at least 3 that you are most curious about, including either 5 or 6 which tie into your organization at the end.)

1. The host spoke of building community being core to Jeffersonian Dinners, which is thrilling because (organization) is focused upon building community in Africa and here in the US. When you think of the word "community," what comes to mind for you?
2. Each of us is philanthropic in the true sense of the word "love of humankind" (from Greek philanthropos) — what are the stories of hope that most touch your heart and inspire you to action?"
3. Our deepest passions often spring from our deepest wounds. Is there

something in your personal story that would lead you to care about poverty alleviation/creating prosperity? (Only ask this question if Moderator has a personal story and he/she starts off first. Note it doesn't have to be a wound; gratitude is a motivator for giving also.)

4. We've all invested in various ways – time, talent, treasure – in solving issues we care about. What is your ultimate vision for your role in creating the world you'd like to see? Or similarly: Tell us about a world in which you would like to see your kids or grandkids come of age?
5. I'm curious — What is it about (organization) that inspired you to join in tonight?

6. What do you find most compelling about the mission of (organization)? (have those who are already supporters answer, and others if they are so moved).

Queueing up the Crescendo

Queue up the crescendo, which is when the organization shares its powerful mission and invitation to join in the journey. Five minutes before the organization leader is to make remarks, the Moderator(s) should wrap up the dinner conversation. Suggested language is:

"There is so much bad news and suffering in the world, but one of the things I love about being in the (organization) community is that I'm part of the good news. I get to be part of the solution and contribute to incredible stories of hope and impact. And while we didn't solve (org issue area) tonight, it's clear we all have a heart for playing our part in creating a better world. What an honor to dine with kindreds who share a passion for prosperity for all. Thank you."

Larger Gatherings

For dinners that involve more than one table, be sure to have unifying remarks at the end of the meal, either by the organization leader or by tables reporting out on the main highlight of their respective table's conversation. We do not recommend doing both in light of time constraints and recognizing that the evening will be winding down soon. Go back to the goal of the evening to decide upon which course to take. If you choose to have the organization leader make remarks addressed to all guests at the end of the meal, the remarks should "bring home" the reason for the dinner, either implicitly or explicitly.

Follow Up/The Ask

As previously mentioned, Jeffersonian Dinners weren't originally designed to be fundraisers. However, there is no reason to not invite participants to join in as funders. This should be a soft ask in a private conversation. For a major gifts/multi-year pledge,

an example would be: "You had a lively table! You'd clearly be a great member of this community. I'd like to invite you to join in; is there anything more you need to know to say yes?" This is an ask that can be made directly after guests get up from their table, while they are still feeling connected with each other and the organization, or in a follow-up phone call or meeting.
If you are in the midst of an ongoing campaign, such as a capital campaign or a major gifts program, an ask could be to invite some of the most enthusiastic participants to host Jeffersonian Dinners of their own and invite their networks.

It is important to follow up within 24 – 48 hours after the dinner with those who participated, either with an ask and/or to thank them for their participation, or something else that maps to the goal you had for the dinner.

For those who were invited but couldn't attend, follow up with a call expressing that they were missed, and take the opportunity to invite them to coffee to determine if you are both aligned in your vision for your issue area, and invite them to get involved.
Note that the Jeffersonian Dinner guide by Jeffrey Walker has more to say on follow-up, so refer to that guide as well.

Other Notes for Moderators

A Black Fox client had some concerns about the conversation waning or other things that could stall the flow of conversation. As a result, we wrote out a few nuggets that may be helpful in getting things flowing again.

What to Do if Someone is Dominating the Conversation
Invite someone else to chime in on the topic. For example, you can say to the person dominating: "You're making great points, I'd love to hear from others on this —Jen, I'm curious to hear about what you think/how you feel about X."

What to Say When No One is Speaking
Highly unlikely, but the Moderator could chime in with responses they've anchored in, such as: "Listening to some of the things we've been talking about, I'm compelled to share that … (example: What originally drew me to solutions around poverty was a deep frustration around…, or What I feel is at stake if we don't address this in Africa is …, etc.)

Addressing Awkward Situations
a) If a participant brings up something personal that makes the table uncomfortable in any way – simply say "That is courageous of you to share that – thank you." And move on to a question that could tie in in some way. Question 4 may fit well here bridging

the vulnerability into a new conversation.

b) If a participant starts crying, the Moderator should go to the person and comfort them briefly and say something along the lines of: "Thank you for your vulnerability." Then a modified question 3 could work here: "I invite others to share – what are the stories of hope or impact that most touch your heart?"

Add-On Questions to Keep the Conversation Going

Tell me more…

That's fascinating; how did you arrive at that…

That's interesting; what inspired you to…

We wish you great success in producing a Jeffersonian Dinner. Let us know how it goes!

WHAT TO DO IF YOUR NGO IS DECLINED FUNDING

By Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

A denial letter or email from a funder can be disheartening, but there is also gold in understanding the "why" behind the denied funding. If your NGO is declined funding, the most valuable thing you can do is to get feedback and guidance to help up the odds for funding in the next round. What would have gotten you over the finish line?

Many funders are happy to share their rationale with applicants, as all are in this sector to create sustainable change. Specific questions can include:

- What was the original inspiration behind inviting us to submit a proposal?
- What was the most compelling aspect of the submission?
- What aspects of our organization set us apart in a positive way from other organizations you've funded?
- What areas do you feel could be improved upon?
- What do you feel is the weakest link in the submission?
- What would have made that weak link stronger?
- On a scale from 1 – 10, where did we land in terms of being a fit with _____ Foundation?
- What would make it a 10?
- What is your greatest funding amount given to other organizations in our issue area of ___________, and what are they doing that inspires that level of investment?
- Under what circumstances do you discontinue funding an organization?
- Under what circumstances would you invite us to resubmit?
- Based upon all you now know about our work, proven theory of change, and more, what other funding partners do you feel should know about (organization)?
- Would you be open to making introductions?
- Is there anything I may have missed that you could share that would strengthen our organization or our relationship with you?

Note: The funder may not want to hop on a Zoom call for 30 minutes so seek permission to submit the questions via email. Also try for Video call as your first request.

Another incredible source is The Unfunded List. The Unfunded List evaluation committee provides helpful and candid feedback on grant proposals and other fundraising materials from experienced experts. If you have questions about your eligibility you can contact help@unfundedlist.com.

Once you receive feedback, we recommend asking yourself:

- Is this something that I can change? For example, if you were declined because they decided to stop funding in your geographic area, that's not something you can change.
- If it is something you can change, ask yourself, is it a good idea for my organization? For example, if you were declined because the funder wants to support a particular programmatic aspect that you don't currently offer, or because the funder is interested in scale, is that a direction you'd consider going in without this funder's support or is this a case of the "tail wagging the dog?" Many organizations have found themselves victim to "mission drift" as they have tried to adapt their programs for various funders. While funding is attractive, it's equally important to stay focused on the integrity of your mission and vision.

If the feedback and internal answers to these questions lead you to want to re-apply, discuss that with the funder. In our experience, an initial "No" from a funder usually doesn't mean no forever, and many organizations that have been successful on the second or third try.

If you aren't able to receive feedback from the funder, you can still learn something. Have any of your peer organizations been funded or denied by the same funder? What was it that set them apart? Reach out and ask them if they'd be willing to share any feedback they received from the funder about why they were or were not funded.

You can also revisit the funder's website and most recent Form 990 and take a closer look at to whom the funder has awarded grants. Are there any common themes among grantees that your organization does not share, or a clear shift in the funder's strategy? For example, are most of the funder's grantees located in a specific geography where you do not have programming? Once you find some commonalities, ask the same questions as you would have had you received feedback from the funder: Is this something I can change? If so, should I change it?
While receiving a denial from a foundation can be discouraging, it can also be an excellent learning experience – you just have to ask the right questions. At Black Fox Philanthropy, our belief is that the best funding experiences – for both funder and grantee – are those that advance your shared mission and vision. Using that as your north star, you'll find the best fit and right relationships to cultivate.

HOW TO CREATE AND DEPLOY AN EFFECTIVE SOCIAL MEDIA STRATEGY

By Natalie Rekstad, Founder & CEO | Black Fox Philanthropy, B Corp

Recognizing that less-resourced NGOs can't afford to engage our fundraising services, one of the ways Black Fox Philanthropy serves the social sector is to be open-source on much of the content we've developed. We regularly release this content via our blog, and today is another one of those days!
Ironically, Black Fox Philanthropy does not engage in Social Media to speak of in large part due to our clients coming to us via referrals, or alliances with sector partners, but we have supported clients with initiatives that help drive funding to their missions. We are thrilled to be sharing some of these insights with our beloved sector.

Engage and Deepen Support via Social Media & E-Communications Strategy

In a technology-dependent world, a compelling and consistent digital footprint has become a vital instrument of success. Non-profit organizations have discovered that leveraging online initiatives — from Giving Tuesday to longer term fundraising drives — enables frictionless engagement with worldwide contributors and enormous potential for connecting with and growing their base of supporters.

Today, a triumphant year-end campaign requires not only a carefully drafted appeal letter, but also a thoughtful approach to all electronic communications, including (perhaps especially) through social media.

This memo will guide you through the best social media and e-comm plans. Black Fox's experts have experience using social media platforms to keep organizations and their messages visible. They know how to develop authentic and engaging social media content that will surface consistently on follower's timelines, with strategies tailored to each platform (and, crucially, across platforms). By using the best approaches to specific social media platforms and newsletter strategies, we can help you build effective marketing calendars for your company.

Section I: Overview

First things are first: It is crucial to understand social media etiquette to create successful content. The principles below will help you avoid serious missteps and apply equally across all social media platforms.

Social Media Begins with "Social"

- Social media is all about building a virtual community. Your goal is to build a community around your organization and mission. You want your followers to feel themselves bonded to your organization and to one another. These relationships will be the key to your success. Understand also that interacting with you will be part of how users curate their own online image, so your goal is to be the organization that they feel good publicly aligning themselves with.

Set Clear Goals and Expectations

- Without clear goals and expectations, your social media communications will be confused and murky. Users will tune out. Any number of goals can be set: Do you wish to build brand awareness? Escalate website traffic? Improve donations? Answering these and similar questions can help you determine not only which platform would be best to use, but what kind of content you should be generating. For instance, an infographic on your organization is a fantastic way to explain your mission, but will not likely drive donations. Likewise, a donation-based campaign might be effective in the short run, but won't necessarily help establish a consistent core of followers. Therefore, it is essential to set clear goals and choose content focused on achieving them.

Quality Trumps Quantity

- While one might be tempted to share tons of valuable content, this can tire users and research shows that platforms such as Instagram penalize excessive posting and use of hashtags. Instead of maxing out your daily post number, begin by asking if your post is adding value to your company's mission or current social media goal. When platforms are "spammed" with an overbearing amount of information, unique, thorough and genuine content is a much more reliable way of building your image and growing the trust of your supporters.

Give Value

- Social media makes self promotion easy and tempting. However, it should be done in tandem with, not instead of, offering valuable content. The 80/20 rule recommends that 80% of your posts should be useful to your audience (by means of education, entertainment, or problem-solving), and only 20% should explicitly promote your business. Ultimately, your posts will serve to boost both awareness of and donations to your organization, but they should do so by building a relationship with users by giving them value before simply asking for contributions.

Positive Tone

- Inspiring a sense of urgency around a pertinent issue guarantees rapid involvement, but constantly conjuring negative emotions and guilt should not be your predominant strategy. Amusing, interesting, surprising or exciting content will both be more beneficial on a long-term basis and likely incite positive associations with your organization among social media followers. Highlighting fascinating statistics or stories of success and ways to get involved will encourage prolonged and candid engagement.

Diverse Visuals

- Photos of the impact your organization has made are incredible ways to showcase tangible positive change, but can become repetitive and mundane. It is important to vary your posting template so you do not fatigue users. Consider employing a range of visuals, such as GIFs, photos, videos, infographics, quotes, spotlights and even collaborative cross posts with other organizations. Polls are particularly engaging because they are interactive. Offering numerous post formats will keep your content fresh and stimulating, providing new opportunities to propel engagement.

Start Conversations

- A guaranteed way of gaining exposure is giving people a reason to talk about your organization. Social media platforms all prefer posts that generate this kind of engagement, and it is good for your organization as well. You can achieve this by reaching out to individuals or groups with a similar mission. Commenting on relevant posts, following certain accounts, reposting inspiring articles, offering valuable resources or asking your audience questions improves the visibility of your company and extends your impact over the bounds of your page. In addition to generating meaningful content, make sure you are constantly looking for ways to continue a discussion on topics relevant to your cause.

Keep on Trend

- Experimenting with new trends is a fantastic way to diversify your content and become relevant to new audience groups. For each social media platform, keep an eye on the “Trending” page, seeking out particular news, hashtags, or initiatives which seem to attract a large audience. Moreover, taking a stance on an important trending issue and expressing solidarity can showcase your organization’s value to your followers.

Know your Audience

- Your followers represent a cross-section of social media users who truly care about your cause. Who are they? Get to know them and vary your content to match their needs. Are they particularly young? Perhaps your content needs to be more trendy. Are they older? Perhaps they prefer more communication by email. Figuring this out can help you serve them better, and increase your impact.

Section II: LinkedIn and Facebook

Great for longer and more informative posts, Facebook and LinkedIn are good platforms for broadcasting your organization's website and/or blog posts. The most professional of the platforms, success on LinkedIn and Facebook depend on a well-defined profile which explicitly conveys your mission and industry. Having effective LinkedIn and Facebook pages for your company will introduce you to a multitude of new connections and potentially even present opportunities for sponsorships, collaborations and expansions.

Curated Profile

- An appealing and relevant header, short but informative bio and a link to your organization's website are all key aspects of an effective profile. If someone sees a post of yours in their feed and clicks on your page, they should immediately be able to understand why that particular content is relevant to your organization. Facebook and LinkedIn allow you more space to showcase projects, contributors, attitudes and groups you may be a part of, which can make it possible for individuals with common interests to find you.

Groups

- Both Facebook and LinkedIn encourage the formation of groups, subsets of users with shared interests. Being a member of or even starting groups that are relevant to your organization's cause, industry or project creates an immediate community, making individuals more engaged with each other and willing to contribute. Not only do groups encourage conversations and networking, they also serve as a space to promote your organization's projects to a selection of individuals guaranteed to care.

Professional Content

- Facebook and LinkedIn are great tools for highlighting your projects, and even provide specific tabs for various executive functions. Therefore, if your organization has completed an exciting project, written an informative article, is planning an event, or is looking for new people to join the team, Facebook and LinkedIn are ideal places to showcase these things.

Encourage Fundraising/Donations

- Facebook's fundraising feature, unique to that platform, makes soliciting donations almost seamless. We recommend you begin experimenting with smaller amounts, such as $10, and observing if your ask resonates with followers. This feature can be used in conjunction with a fundraising campaign and, potentially, a donor matching opportunity. It has the additional advantage of making the outcome of your social media campaign easily measurable.

Study Insights

- Both Facebook and LinkedIn offer detailed information about user behavior (called "insights"). From revealing how many individuals viewed your page to the times and posts which yielded the highest level of engagement, these tools can help your organization determine both when to post and who to curate the content to. Insights can help you determine which social media strategies are succeeding, and where you need to make adjustments.

Section III: Twitter

No social media platform moves faster than Twitter. Generating nearly immediate responses, Twitter harnesses relevant news, trends, discussions and ideas, igniting conversations among its over 330 million users. Staying vigilant and active in the Twitter conversation scene can help your organization feel current and relevant and allow it to establish a distinct social voice without the need to constantly curate complex content.

Brevity

- A tweet is limited to 280 characters, giving constrained space for expression. On the platform, audiences are drawn to beguiling but brief headlines and ideas as opposed to lengthy statements. While Twitter can definitely be used to promote blog posts, events, or articles, your organization's Twitter page should do so in a way which preludes longer content with an enthralling caption.

Rapidity

- Trending topics on Twitter usually remain on the shelf for roughly 11 minutes before being replaced by a novel source of conversation. With such a quick turnaround for relevant topics, your organization should be on a constant lookout for discussions that would be sensible to engage with. Given the influx of information, we recommend establishing a radar for a narrow range of topics most applicable to your organization's cause.

Reposting

- Twitter is a platform which values sharing others 'thoughts. By following accounts involved in your organization's areas of expertise, your own Twitter feed will populate with interesting, relevant insights. Selectively retweeting such content can help you further engage with invested audiences and make your account a space for showcasing ideas your organization agrees with and outside projects it supports.

Engagement

- A significant amount of Twitter engagement takes place in the subtweet, or comment section of a post. Oftentimes, it is such threads of conversation that gain the most traction. If your goal is to spread awareness about your organization, participating in ongoing discussions or interacting with threads can help the relevance of your organization's account. However, we recommend keeping your organization's mission in mind throughout any potential public conversations.

Section IV: Instagram

Instagram, as a platform, occupies a middle ground between the seriousness of LinkedIn and Facebook and the quippy concision of Twitter. Aesthetic visuals are the key on this platform. Multiple video functions, such as reels and stories, invite different marketing opportunities.

Stories

- Not unique to Instagram, stories are a feature that allow one to post and promote content for a 24 hour period. Usually consisting of reposts from other accounts, brief updates, reminders, basic infographics, daily snippets or short-term promotions, stories are a quick way for your organization to remain active on social media without flooding followers 'feeds. In addition to allowing photo and video posts, the feature offers the possibility to create polls, countdowns and links that can be leveraged to improve engagement. In order to make your story appear at the top of your supporters 'feeds, we recommend adhering to at least one daily post which can (but doesn't have to) have any of the items listed above.

Captions

- Because of Instagram's visual focus, captions are rarely read by followers. That being said, your organization's account should utilize the space for a limited number of relevant hashtags (which can help users find you) and keep other text brief. We recommend making your captions an invitation for action or thought, meaning they should ideally invite your audience to click a link, donate, answer a question, tag a friend, or even share the post itself. It might be helpful to consider the Instagram caption as an extension of a Tweet: it should have few characters, a dense amount of information, and explicit relevance to your organization's goals.

Multiple Photos

- Presently, Instagram allows users to compile a set of images and videos into a slideshow which appears as a single post. Interchanging quotes with videos from which they were extracted or making a small series of consecutive infographics might encourage your followers to spend more time analyzing your post. When grouped together like this, your content should have a clear visual homogeneity and we recommend keeping the number of slides to a maximum of 5, so as to not overstimulate or bore quickly-scrolling audiences.

Instagram Reels

- Similar to TikTok, Instagram Reels is a feed mode that strictly shows users video content. Since reels are shown to an individual based on their perceived areas of interest, reels present a wonderful opportunity to reach audiences that do not currently follow your organization's account. Informative videos, animations, or even video trends make perfect reel content. However, we urge you to keep videos intended for reels on the shorter side (less than 60 seconds). Longer videos can be posted to Instagram in a section called IGTV (see below).

IGTV Series

- Designated for longer and perhaps more serious content, IGTV is the label attributed to videos published on Instagram that are longer than 60 seconds.

Through this platform, your organization can share interviews, longer project descriptions, vlogs and other mission breakdowns. While IGTV videos might not be as popular as reels due to their length, we suggest creating specific series which will eventually become familiar to your followers, encouraging them to return for scheduled content.

Section V: Advertising

All social media platforms have ample opportunities for paid advertisements and partnerships. This means that if your organization is seeking account traction, you might find it useful to pay for content to be promoted or advertised in the feeds of potential followers.

Advertising

- Social media advertisements act as digital billboards, pushing your organization's posts to target audiences 'feeds, usually for somewhere between $0.20 to $6.70 per ad. Using algorithmic data collection, social media platforms will automatically advertise your promoted content to those they believe will have the highest probability of interacting with the post. If you are having trouble gaining a significant following or generating support for a particular campaign, short-term advertising might be a beneficial social media strategy.

Partnerships

- Social media platforms are a great place to seamlessly network and partner with other organizations supporting your cause. Reaching out to well-known companies for collaboration opportunities or establishing common projects with other groups at your organization's level is a great way to promote your profile and campaigns to a larger audience. While associations can be organic, it is also possible to enter into paid partnerships if you are seeking to reach a specific target audience or convey an explicit message. Before delving into such alliances, we recommend determining specific cooperation outcomes and only working with companies and individuals who truly acknowledge or advocate for your organization's cause.

Influencers

- If your organization has specific merchandise or the ability to invite individuals to participate in ongoing projects, you may be able to take advantage of influencer marketing. Seeing a popular social media figure pose in a t-shirt with your logo, post a picture from a trip hosted by your organization, or even talk about a recent project or product of yours will likely encourage a portion of their fans to view or even follow your organization's profile. Increasingly meaningful relationships between influencers and your organization can inspire fan support and donations.

Section VI: Electronic Communications

Regular email newsletters are a great supplement or alternative to social media posts. Emails offer you space to publish articles, interviews, studies or blogs relevant to your mission. While these should be guided internally, we recommend advertising any publications externally through any of the methods described above. A bi-weekly, monthly or annual newsletter will also prompt your organization to curate interesting relevant writings, and simultaneously create content which can go hand-in-hand with social media campaigns.

Likewise, adding links to blog or article posts into Facebook and LinkedIn pages, Twitter captions, or Instagram story hyperlinks can extend your ecomm reach beyond email inboxes and encourage traffic to your website.

Section VII: Content Calendar

In order to harness the benefits of these discussed social media and ecomm strategies, Black Fox Philanthropy recommends creating a content calendar. Setting and sticking to a consistent electronic presence and focusing on specific goals are both necessary factors of digital marketing, and we believe that they are best achieved through a schematic approach. Below are several elements to keep in mind when creating your campaign calendar, which you can begin to implement by following Black Fox Philanthropy's calendar template.

Frequency

- Especially if you have a smaller following, posting too frequently can feel "spammy" and result in 50% fewer clicks per post. While you might be getting a higher number of likes, an overwhelming number of posts will decrease overall follower engagement. Conversely, posting more moderately, perhaps 1–5 times a month, can double overall supporter interaction. It should be noted that the ideal posting frequency will vary depending on your social media goals. For example, if your organization has decided to dramatically improve awareness and exposure, posting recurrent digestible content has been found to correlate with visibility. Fundraising initiatives, on the other hand, have shown to be more compatible with slower, consequential posting.

Holidays

- Holidays — times when families and friends come together in celebration — often make people feel generous. As holidays approach, consider altering your content accordingly, either by giving your posts a festive look or playing to themes from the specific holiday: thankfulness and giving for Thanksgiving, family values and joy for Christmas, meaningful resolutions for New Years, etc.. Matching your content to the spirit of the season will help your organization mobilize holiday energy toward your cause.

Giving Tuesday

- Unlike other holidays when social media content might benefit from more subtle or implicit fundraising strategies, Giving Tuesday — the first Tuesday after Thanksgiving, a day set aside for supporting charities — is a great day to explicitly ask for donations. In this instance, putting the holiday on your supporters 'radar ahead of time will dramatically work in your favor. Starting approximately two weeks prior to generate a sense of urgency among followers. Establishing a definite ask for a specific Giving Tuesday goal helps your audience to become comfortable with your project and budget, and eventually take initiative. Frequent reminders and calls to action are extremely helpful social media strategies during this time when they feel less intrusive and more expected.

We wish you well as you craft and deploy your strategy to engage and deepen your relationships!

Created with the additional contribution of Kate Lessman, Think Big Media PR, and Varia Voloshin, Black Fox Philanthropy Intern, Wesleyan University.

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