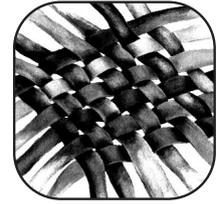


MODULE 16: FUNDRAISING AND MEMBERSHIP



Step One: Creating Your Inclusioness Committee

Step Two: Training and Consultants

Step Three: Definitions and Case Statement

Step Four: Gathering and Analyzing Inform

Step Five: Creating Your Inclusioness Blueprint

Step Six: Implementation



MODULE 16: FUNDRAISING AND MEMBERSHIP

Overview of Content

In this module, you will:

- Learn about inclusive fundraising and membership strategies.
- Examine the benefits of creating fundraising and/or membership development strategies that reach out to diverse communities.
- Analyze the data from the information-gathering process that pertain to fundraising and membership.
- Review a series of concrete suggestions for developing more inclusive fundraising and membership strategies.
- Establish goals and objectives for developing more inclusive fundraising and membership strategies that will be integrated into the inclusiveness blueprint.

This module should be completed by any organization that has decided to look at the inclusiveness of its **fundraising and/or membership development** practices. If you haven't prioritized these areas as a part of your inclusiveness initiative, then skip to *Module 17: Completing Your Inclusiveness Blueprint*.

Who to Involve

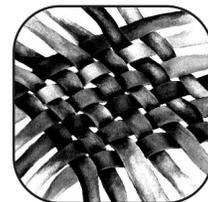
The work in this module will be completed by the Inclusiveness Committee as a whole or a subset of the committee that would include members who have particular expertise about or responsibility for fundraising and membership.

Exercises to Complete

- *Exercise 16-A: Benefits of Inclusive Fundraising and Membership Development Efforts*
- *Exercise 16-B: Analyzing Information*
- *Exercise 16-C: Developing an Action Plan for Fundraising*
- *Exercise 16-D: Developing an Action Plan for Membership Development*
- *End-of-Module Checklist*

Step Five: Creating Your
Inclusiveness
Blueprint

MODULE 16: FUNDRAISING AND MEMBERSHIP



Please note: Many of the statements made throughout this workbook, but particularly in this module, are generalizations about the behavior of a group as a whole. While it is always risky to make such generalizations, they can be helpful in breaking down basic barriers of understanding. Because staff members in nonprofit organizations often identify lack of understanding as the most significant impediment to effective fundraising in communities of color, we must examine these practices – and recognize the limitations of generalization. Keep in mind that, as with white donors, donors of color will have individual and specific concerns about their gifts, different motivations for giving, and a variety of levels of contribution.

Why Inclusive Fundraising Practices Matter

Despite well-known shifts in demographics in the United States, most fundraising practices in mainstream nonprofit organizations still target the “traditional” donor: wealthy, older, and white. Many fundraisers do not attempt to raise money from communities of color – even if they may spend much of their time serving such communities through their programs.

Engaging the support of communities of color is important for three main reasons:

1. The populations of communities of color are growing dramatically in the United States.
2. The wealth and influence of individuals of color is significant and expanding.
3. Generally speaking, organizations tend to respond to the needs of their donor populations, so by increasing funding from communities of color, it is conceivable that the organization’s programs will refocus, also.¹

Communities of color are growing faster as a proportion of the population than their white counterparts. As of the 2000 census, the African-American, Latino, Native American, and Asian/Pacific Islander communities represented 30 percent of the U.S. population. This number is expected to increase to 50 percent by the year 2050.² Although all areas of the country won’t experience these demographic changes in the same way, it is likely that they are affecting your organization, no matter where you are located.



Income levels, home ownership, education rates, and business ownership rates are all increasing faster in communities of color than in the population as a whole.³ Thus, in addition to displaying generous behavior at rates that approach and sometimes exceed their white counterparts, members of communities of color have often earned their wealth recently. In *Module 10, Board of Directors*, page 84 you will find a description of the growing influence of communities of color in philanthropic giving.

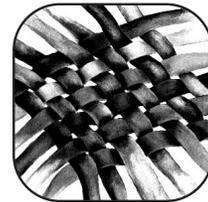
Recruiting donors from communities of color can also help you build a more stable funding base. When donors from a broad range of communities financially support your organization, you will be on much firmer footing when economic, political, policy, and program changes take place that affect your organization.

In a 2004 recent article in the Washington Post,⁴ writer Jacqueline Salmon reported on the following recent major gifts from donors of color:

- African-American publishing magnate John H. Johnson donated \$4 million to Howard University's School of Communications in 2003.
- Native American tribes have given a total of \$35 million for the construction of the Museum of the American Indian.
- Hispanic technology investor Alberto Vilar has given tens of millions of dollars to arts organizations (although business setbacks forced him to scale back some of his promised donations).
- Jeong H. Kim contributed \$5 million to the University of Maryland's A. James Clark School of Engineering in 1999 for construction of the Jeong H. Kim Engineering Building, the university's first facility named after an Asian American.
- In the past three years, Baltimore African-American money manager Eddie E. Brown and his family have donated \$6 million to the Maryland Institute College of Art, \$1 million to the Enoch Pratt Free Library and \$5 million to help African-American children in poor Baltimore neighborhoods.

These gifts demonstrate that, as their wealth and influence grow, individuals of color are often very generous to nonprofit organizations.

Charitable giving is an exchange of values in which a donor essentially says: "I value the mission of your organization, therefore I give you my money. The value I receive in return is the accomplishment of your mission and your communication of that accomplishment to me." In this very personal exchange, organizations must respect the differing motivations and cultural backgrounds of potential donors. By respecting and honoring these differences, you can create more authentic and connected relationships with donors from communities of color, resulting in greater continued support.



Why Inclusive Membership Development Practices Matter

If your organization operates on a membership basis, then the demographic changes described above apply directly to your membership development efforts. Membership-based organizations fall into two main categories: those who invite anyone to become a member and those who seek members from a particular profession, group, or segment of the community.

- If your organization has an open membership, then the broad demographic changes in the population apply to your potential membership base.
- If your organization seeks members from a particular profession or group, then the demographic changes may be taking place in different ways, depending upon the group you target.

Membership organizations find that if they don't address demographic shifts, they see eroding membership numbers and decreasing influence in communities that are more diverse than ever.

For example, one of the nation's largest and most well-known membership associations is the Parent-Teacher Association (PTA). The organization is struggling to maintain its relevance in the changing face of the country, as its membership remains 90 percent white and mostly female. "We have a huge amount of work to do if we want to remain a viable organization," said Carla Niño, president of the California PTA and the group's first Latina state chief. "We need to redefine the face of the PTA to look like our communities."⁵

Defining Benefits for Your Organizations

As you begin to develop and expand inclusive practices in fundraising and/or membership development, you will want to identify the potential benefits of these activities for your organization.

Note for Organizations Interested in Addressing Other Diverse Communities

Focused strategies to expand fundraising and membership development activities to be more inclusive of people of color are directly applicable if you choose to expand your focus to multiple identity groups. For example, many organizations have success in designing donor circles – small groups of donors that may or may not be from a similar demographic group, such as women or individuals under 35 – that allow other diverse populations to understand their programs and how these donors and potential donors can be supportive.



Before proceeding, give some thought to other ways that creating a more diverse and inclusive fundraising and/or membership development strategy could help your organization.

Complete Exercise 16-A: Benefits of Inclusive Fundraising and Membership Development Efforts.

Communities of Color and Community Involvement

It is a persistent myth that people from communities of color are less generous and less involved in their communities than white Americans. This couldn't be further from the truth. All cultures have deeply held beliefs about individual obligation to the broader community. In communities of color, where individuals have often worked together within the context of racism in our broader society, community connections have often become even stronger.

When people of color give charitably, they often do so through less “traditional” vehicles – methods that do not register in studies by the Foundation Center or *Giving USA*.⁶ However, in the context of each community, these practices are usually based in meaningful traditions and deep-rooted beliefs. These vehicles often involve giving support directly to people in need. In Asian-American and Latino communities, many more-recently immigrated people send billions of dollars in “remittances” back to their home countries, to help family members and to build housing, schools, churches, and hospitals.⁷ Many donors of color also give through numerous membership and community associations traditionally associated with specific cultural groups. Research shows that some preferred charitable vehicles among communities of color include:

- Family and friends
- Mutual aid associations
- Emergency aid, loans, human services
- Faith-based institutions
- Churches, temples, mosques, etc.
- Fraternal, cultural, and social organizations
- Professional, occupational, and business associations
- Tribes, tribal organizations, and funds
- Community organizations and funds
- Civil rights/social justice organizations
- Cultural/community centers
- Health clinics, hospitals, and nursing homes
- Historically black and tribal colleges⁸



The breadth of this list speaks to the impressive tradition of giving and social involvement in communities of color. Research also shows that giving and social involvement changes depending on a person’s current stage of life, and that there are generational differences in giving patterns.

For example, some evidence shows that older African Americans, Latinos, and Asian Americans more often focus their giving on their respective ethnic communities, whereas those born after the enactment of Civil Rights legislation in the mid-1960s more often focus their giving on a broader community not defined by race or ethnicity.⁹

Jessica Chao, author of the chapter on Asian-American philanthropy in *Cultures of Caring*, has developed a helpful continuum to identify how individuals within communities of color generally change their giving behaviors, depending on whether they are in the survival, helping, or investing stage.¹⁰

Figure 1.2. Continuum of Philanthropy: African American, Asian American, Latino.

Living Stages	Survive	Help	Invest
	Highly personal sharing Known recipients Informal, direct, immediate responses	Personal giving and involvement Ethnic-specific Responsive, compassionate	Ethnic-specific Pan-ethnic and mainstream Formal, proactive, long term, planned
Increasing cultural, social and financial stability →			
			
Giving Stages	Motivation Sharing among social and economic peers	Giving to less fortunate Desire to give back Identifying with need Supporting projects	Empowering vision Building the ideal community Producing programs
	Vehicles Family Voluntary associations Faith-based organizations Mutual aid societies	Family and voluntary associations Ethnic organizations Community causes Faith-based organizations Nonprofit organizations	Ethnic and pan-ethnic organizations Noncommunity causes Mainstream organizations Private and community foundations
	Causes Family or friends in need Children and elderly Remittances	Family and friends Education Cultural heritage Civil rights or social justice Health Remittances	Colleges and universities Cultural institutions Civil rights or economic development Hospitals and medical research

Of course, the list and diagram here present simplified compilations that do not represent the characteristics or behaviors of all members of diverse communities. However, as your organization reaches out to people of color as potential donors and members, keep these trends in mind.

This module provides information about giving in communities of color at an overview level. As you consider the various sub-groups of donors and potential members with whom you wish to make contact, build gradually toward researching the giving and community involvement behaviors of each targeted group.



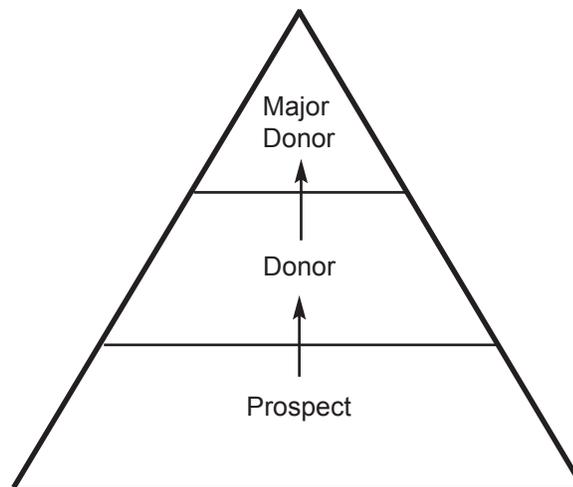
Among the resources used in compiling this module are two books that offer in-depth examination of the giving and community involvement behaviors of African Americans, Asian Americans, Native Americans, and Latinos: *Cultures of Caring*, published by the Council on Foundations, available for download at www.cof.org; and *Opening Doors: Pathways to Diverse Donors*, by Diana S. Newman, John Wiley & Sons, available for purchase at www.wiley.com. Additional information, contacts, and resources are available through the web sites for affinity groups of philanthropists and funders in each of these communities:

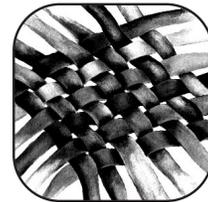
Asian Americans/Pacific Islanders in Philanthropy: <http://www.aapip.org/>
ABFE (Association of Black Foundation Executives): <http://www.abfe.org/>
Hispanics in Philanthropy: <http://www.hiponline.org/>
Native Americans in Philanthropy: <http://www.nativephilanthropy.org/>

Complete Exercise 16-B: Analyzing Information.

Fundraising Strategies to Reach Communities of Color

As you expand your current fundraising strategies to reach communities of color, consider making adjustments to each step of the fundraising process.





Here are some suggested strategies for each of the three broad levels of the pyramid. In general, the usual principles of fundraising apply to diverse communities. To ensure sustainability, they should simply be executed with an understanding of the culture and context of the individuals to whom you are reaching out and as part of broader inclusiveness efforts.

Developing Prospects from Communities of Color

The first step in fundraising is providing opportunities for individuals to become aware of your organization and to become qualified as prospects. To accomplish this, build on techniques of marketing and community relations such as those described in *Module 15: Marketing and Community Relations*, which create a sense of trust and connectedness between your organization and the community you seek to reach.

You will then seek to establish connections within that community. There are two general ways to address this work:

1. Reach out to a broad segment of the audience with whom you wish to connect.
2. Develop targeted relationships within that audience.

Consider the balance of such efforts and where your resources and goals best match with your available strategies.

To reach out to a broad segment of the audience employ such efforts as special events, open houses, and speaking engagements. Remember that these methods need to be designed carefully to reach your target audiences. When you plan a special event, ask for and listen to input from people within the community you seek to reach regarding such details as *location, message, food, timing, child care, and activities*.

For example, a gala event featuring French cuisine with an entry ticket of \$500 will likely appeal to a narrow audience, while a community holiday party with activities for children will likely be more attractive to a wider group of people.

Remember that your event should give you the chance to tell your organization's story to your new audience, and that events can also give you an opportunity to involve potential donors as volunteers. Such personal connection can be very important to people from diverse communities.

Once you have considered whether and how you will use broad outreach methods to reach potential donors from communities of color, consider how to create targeted relationships with potential donors. To nurture these relationships, remember the following important steps:



“In our concern for others, we worry less about ourselves.”

*-His Holiness the 14th
Dalai Lama*

- Develop connections with trusted individuals within the targeted community who can serve as "connectors" to introduce you to others and help you understand the values and customs of the people you meet.
- If appropriate, send a letter of introduction, then follow up with a personal phone call.
- Meet in a location that is comfortable to the person with whom you are meeting; if possible, ask your trusted community "connector" to join you.
- Take time to establish a relationship and connection with the person before asking for support.
- Follow up in a timely and thoughtful manner after your initial meeting.

Now that you have cultivated a group of prospects, give them opportunities to become supporters of your organization.

Moving Prospects to Donors

Some of the traditional fundraising methods (direct mail, media appeals, etc.) have been shown to be less successful within communities of color. Organizations have sometimes had success with targeted mailings and public service announcements that are tailored to the specific interests of the community in question. However, all communities report that they are more likely to give in response to a personal request. Chances of moving a prospect to an active donor increase if the prospective donor feels a personal connection to the cause and/or to the person requesting the support.

These personal connections can be nurtured through the following methods:

- Individual meetings
- House parties or small social gatherings
- Larger special events

To ask for contributions through any of these methods, identify the person within your organization who has the closest connection to the prospect, and create an opportunity for that person to make the request, host the party, or provide invitations for involvement in the special event. Remember to talk with board members, volunteers, community partners, and clients who may know your prospects and would be willing to participate in such discussions.



Points of view differ as to the success of directly asking individuals from communities of color for support in personal meetings. Some say that personal solicitation is the only way to make real connections, while others share a concern that in some communities, a direct ask can lead to discomfort. Given the vast array of cultural differences among communities of color, no general rule fits every racial or ethnic group when it comes to how to ask for a contribution.

- The best method for determining how to approach someone is to develop a relationship with that person, just as you would with any other donor, and to ask for advice on developing the relationship from someone who is close to him or her.

Be sure to follow up with acknowledgements as soon as possible after any kind of contribution has been made - and especially if it was given through a personal request, house party, or special event. For communities where trust and personal relationship are highly valued, appropriate recognition is critical.

Moving Donors to Major Donors

In addition to basic information gathering about donors within each community of color, researchers have looked at the behavior of those who have reached the "investing" stage as described by Chao. Donors from diverse communities who give at least \$10,000 a year to charitable causes often share the following characteristics:

- First-generation wealth.
- Wealth from entrepreneurial enterprises in specific industries.
- Live in multiple worlds/cultures.
- Participate in multiple networks.
- Biculturally fluent.
- Most often prefer causes that impact their own communities.
- Rarely limit giving to their own community.
- Reluctant to commit to long-term charitable planning.

Such donors also identify four common reasons for giving major gifts to particular causes or nonprofits:¹¹

1. They identified with the nonprofit and its cause or beneficiaries and were passionately committed to the issues.
2. They had participated in the nonprofit and its cause for some time, either on a board or advisory committee or on a gala or event committee.
3. The major gift, particularly an endowment, was never the first gift; rather, it followed a sequence of increased financial commitment over time.



4. Someone they knew and trusted personally asked them to contribute; often this person was revered in their community.¹²

You can use these findings to design a program for developing major donors within communities of color. As described in the other stages, the same principles that apply to all fundraising apply to raising large gifts from donors of color: determine or develop your connection, create the appropriate environment to ask for a gift, have the right person make the request, and provide appropriate and immediate recognition.

Membership Development Strategies to Reach Communities of Color

According to Rotary International, one of the world's largest membership organizations, there are three stages to membership development: recruitment, retention, and expansion. Consider the needs and interests of communities of color in each of these stages.¹³

The Association Forum of Chicagoland offers some suggestions for expanding recruitment of diverse members:

- Broaden membership benefits and services to include the needs of diverse audiences and balance those needs against those of more traditional members.
- Conduct campaigns specifically to attract diverse audiences.
- Tailor membership promotions to diverse audiences, using targeted media.
- Partner with similar industry or professional organizations that represent a diverse segment of your membership eligible universe.¹⁴

Some organizations find success in developing membership programs to appeal to a particular group, while others will identify ways that its traditional membership programs can be tailored to diverse audiences.

For example, the Public Relations Society of America (PRSA) has an initiative to build diversity throughout its membership. Strategies include developing a commitment to diversity among key leaders in the organization, creating visible leadership opportunities for members from diverse communities, and creating a toolkit for chapters to use in recruiting diverse members.¹⁵ On the other end of the spectrum, the Mexican Fine Arts Center in Chicago has created Opano Mexico, an organization reaching out directly to young Mexican Americans in their twenties and thirties.¹⁶

Other common methods for developing and retaining members from diverse communities include:

- Intern and fellowship programs for potential members of color.
- Outreach in partnership with existing membership organizations that reach these groups, such as community-specific chambers of commerce and mentoring programs pairing new members with current members who are from communities of color.



You will want to find the membership development techniques that best match with your target communities and the characteristics of the subset you seek. Since many membership organizations across the country - from the Association of Research Libraries to the American Public Transportation Association - are actively developing diversity among their members, you will find a wealth of ideas to support your efforts.

Complete Exercises 16-C: Developing an Action Plan for Fundraising and 16-D: Developing an Action Plan for Membership.

Track your progress in completing Module 16 on the End-of-Module Checklist, located after the exercises.

¹ Grassroots Institute of Fundraising Training (GIFT), www.grassrootsinstitute.org.

² Newman, Diana S. *Opening Doors: Pathways to Diverse Donors*, San Francisco: John Wiley & Sons, 2002.

³ Newman, *ibid*.

⁴ Salmon, Jacquelin, "Charity's New Look: Minorities Grab Fundraisers Notice," *Washington Post*. Washington, DC: November 7, 2004, pg. F01.

⁵ Rubin, Joel, "PTA's Course Is Clear; Leaders say that if it is to remain a force, the group must strengthen, diversify its membership," *Los Angeles Times*, Los Angeles, Calif.: Jun 27, 2004. pg. B.1

⁶ *Engaging Diverse Communities For and Through Philanthropy*, New Ventures in Philanthropy, 2003, page 8.

⁷ Salmon, Jacquelin, *ibid*.

⁸ *Cultures of Caring: Philanthropy in Diverse American Communities*, Council on Foundations, Washington, DC: 1999.

⁹ Mottino, Felinda, and Eugene D. Miller. "Pathways for Change: Philanthropy Among African American, Asian American, and Latino Donors in the New York Metropolitan Region" (Executive Summary). Coalition for New Philanthropy, September 2004, page 2.

¹⁰ Newman, *ibid*.

¹¹ Council on Foundations, *ibid*.

¹² *Engaging Diverse Communities For and Through Philanthropy*, New Ventures in Philanthropy, 2003, page 12.

¹³ <http://www.rotary.org/membership/development/>

¹⁴ <http://www.associationforum.org/resources/diversity-topics.asp>

¹⁵ http://www.prsa.org/_About/Leadership/diversity-mission.asp?ident=div3

¹⁶ Newman, *ibid*, pg. 100.

Module 16: Fundraising and Membership

CHC Inclusiveness Committee develops a plan for recruiting a more inclusive donor base.

Mrs. Dreyfuss sat at the head of the table where Eleanor, Joe, Beth, and the fundraising assistant, Mary Catherine, were developing a plan for increasing the inclusiveness of CHC fundraising efforts. Their first task was to identify the benefits of a more diverse donor base.

“That’s easy!” said Mary Catherine. “More money!”

“Of course,” said Eleanor, smiling. “That’s an important one. I’ll also put down deeper community connections. It seems like our old, generous group of folks is getting, well, old! We need some new blood, and since the demographics show that the younger population of our community is much more diverse, then we better be making some new connections.”

“I’d like to add the importance of receiving contributions from the community surrounding the clinic,” said Joe. “If we ever had a zoning dispute, I want everyone in the surrounding neighborhood to think of this as ‘their’ clinic.”

“How about a more stable funding base?” said Beth. “We have all of our eggs in the basket of one small segment of the community. It seems a little fragile to be so reliant on the generosity of one group of people.”

Mrs. Dreyfuss, who had been silent up to this point, finally spoke. “That fragile group has supported this clinic in fine style for fifteen years.”

“Yes, Alice, they have,” said Beth. “But who ‘they’ are - the community leaders, the people with resources - that’s all changing now. That’s why so many other clinics are doing the work of expanding their donor bases.”

Mrs. Dreyfuss shrugged and frowned. As the group continued to brainstorm, Joe and Beth exchanged a look of concern.

They moved on to reviewing the data from the information-gathering phase.

Mary Catherine pointed to the numbers of donors who gave through the clinic. “Just from looking at last names, we estimated that 70 percent of the donations that we receive in the clinic donation boxes are from diverse families. And some of them are pretty generous, given that most of our clients are living pretty close to the edge.”

“Goodness,” said Mrs. Dreyfuss. “I hadn’t realized this!”

“Well, the workbook says that clinics are traditionally an area where people from diverse communities will tend to give,” said Eleanor. “And that sure is borne out in Los Angeles. The health clinic in East Los Angeles has developed a circle of supporters from the Latino community. They have something like two hundred families signed up, and that’s after just three years.”

“I don’t know if we’ll have results that dramatic,” said Joe. “But it’s worth looking at.”

Beth, who had been perusing the Board interview responses, chimed in. “I

think whatever we develop has to acknowledge that most Board members love our existing events. And they don't want to change those. If we have a sacred cow in the process, it's those gala events."

"Oh, and they're so much work!" said Mary Catherine. "I'd love to add in a simple spaghetti feed every once in a while."

"And just how much can you charge for a table at a spaghetti feed?" asked Mrs. Dreyfuss. She said the word "feed" as if she had a bad taste in her mouth.

"Well, it's certainly different from what we've done, and it couldn't replace our existing events," said Eleanor. "But if it gave us a chance to get people acquainted with the clinic, that would be valuable. Let's keep that on hold for our discussion of tactics we can use to recruit diverse prospects."

After examining the research and completing the associated exercise, they moved on to setting goals for their fundraising plan. They decided to:

- increase event attendance and participation from diverse donors
- connect with current donors from communities of color and encourage them to increase and continue their giving
- begin cultivating major donors from diverse communities

They were looking for outcomes that included doubling the number of diverse donors who attend their signature events, a 25 percent increase in the number of gifts from donors of color, and an increase of 10 percent in total giving from these donors.

"This is great," said Eleanor. "And it will be much easier if we're able to enact some of the volunteer recruitment strategies that Marcie and I discussed. Mrs. Dreyfuss, Beth, do you feel that these goals will be able to align with the goals of the Board's development committee?"

Beth looked to the Board chair for an answer. Mrs. Dreyfuss thought for a moment, then nodded. "I do, but you're going to have to emphasize that all this will be in addition to what we're already doing. Are you sure you and Mary Catherine can manage all of this?"

The two women looked at each other and laughed. "We're incredibly busy as it is!" said Eleanor. "Thanks for thinking of us, Mrs. Dreyfuss. Joe, do you think there would be money in the budget for a part-time staff person to help us just with events? The increased revenue we bring in would eventually more than pay for his or her salary."

"I do think you need someone," said Joe. "But why don't we start out with an events consultant?"

"I'd rather actually hire someone who brings with them some expertise on reaching these new communities. No offense, Mary Catherine, but you and I aren't exactly the experts on the Latino community," said Eleanor.

Mary Catherine laughed again. "Nope," she said. "I'm sure willing to learn, though."

"We'll take a look at the budget and see if this can work, perhaps starting first thing next year. For now, let's put it in the plan. We want our best case scenario to be in the blueprint," said Joe.

EXERCISE 16-A

Benefits of Inclusive Fundraising and Membership Development Efforts

Instructions:

Write down all of the benefits that you can think of for having more inclusive fundraising and/or membership development efforts.

- Before you begin, revisit Module 4: Making the Case for Inclusiveness, Exercise 4-B: Visualizing Greater Inclusiveness for a reminder of some of your initial reflections on this matter.
- In addition to the points discussed in the module, think about benefits that might be specific to your particular organization.

Date Exercise Completed _____

EXERCISE 16-B

Analyzing Information

Instructions:

Refer to Module 7: Information Gathering, Part 3: Compiling Results

- Exercise 7-C: Available Facts: Compiling Other Information
- Exercise 7-G: Stakeholder Perspectives: Compiling Likert Scale Responses
- Exercise 7-H: Stakeholder Perspectives: Compiling Narrative Responses

Select and review the information that pertains to mission and organizational values.

Answer the questions below.

Available Facts

In what ways do your organization's fundraising and/or membership development activities already reach diverse communities? How are those current efforts successful? How can they be improved?

In what ways are your organization's fundraising and/or membership development activities more or less inclusive than those of other organizations in your field?

continued

EXERCISE 16-B: Analyzing Information *continued*

What best practices from the field regarding fundraising and/or membership development are applicable to your organization?

What trends can you identify in fundraising and/or membership development that are relevant to your inclusiveness initiative?

Did you notice anything else regarding your fundraising and/or membership development activities in the results of the available facts scan?

continued

EXERCISE 16-B: Analyzing Information *continued*

Stakeholder Perspectives

Are there any salient themes regarding your organization's fundraising and/or membership development that were identified by a majority of your stakeholders?

In what ways is the culture of your fundraising and/or membership practices perceived by different stakeholder groups to be welcoming of people of color?

Do stakeholders believe that the organization currently has success in fundraising and/or membership development with communities of color?

continued

EXERCISE 16-B: Analyzing Information *continued*

What stories or strongly held beliefs regarding your organization and its fundraising and/or membership development activities were identified by stakeholders?

Are there any significant inconsistencies in perspectives among groups of stakeholders regarding your organization's fundraising and/or membership development activities?

What trends can you identify regarding your organization's fundraising and/or membership development based on the perspectives of your stakeholders?

continued

EXERCISE 16-B: Analyzing Information *continued*

Did you notice anything else regarding stakeholder perspectives in relation to fundraising and/or membership development?

Is there any additional information regarding fundraising and membership that currently isn't available that you would like to collect in the future?

yes no

If YES, what additional information would be helpful?

Date Exercise Completed _____

EXERCISE 16-C

Developing an Action Plan for Fundraising

Instructions:

Using the following template, record the problem statement, goals, etc., as well as the steps that you will take to accomplish your goals. Remember that every organization usually has its own way of defining goals and objectives. The outline below can be tailored to match your organization's usual planning process.

(1) What is the primary problem you want to address in regards to potential and current donors?

(2) What is/are your desired goal(s)?

continued

EXERCISE 16-C: Developing an Action Plan for Fundraising *continued*

(3) For each goal, what is/are your desired outcome(s)?

(4) For each goal, what are the primary objectives you hope to accomplish?

(5) For each objective, what tasks will you complete to accomplish the objective?

(6) Who will be responsible for completing each task?

continued

EXERCISE 16-C: Developing an Action Plan for Fundraising *continued*

(7) When will the objectives and tasks be completed?

(8) What resources, financial and otherwise, are necessary for achieving each goal?

Date Exercise Completed _____

EXERCISE 16-D

Developing an Action Plan for Membership

Instructions:

Using the following template, record the problem statement, goals, etc., as well as the steps that you will take to accomplish your goals. Remember that every organization usually has its own way of defining goals and objectives. The outline below can be tailored to match your organization's usual planning process.

(1) What is the primary problem you want to address in regards to potential and current donors?

(2) What is/are your desired goal(s)?

continued

EXERCISE 16-C: Developing an Action Plan for Membership *continued*

(3) For each goal, what is/are your desired outcome(s)?

(4) For each goal, what are the primary objectives you hope to accomplish?

(5) For each objective, what tasks will you complete to accomplish the objective?

(6) Who will be responsible for completing each task?

continued

EXERCISE 16-C: Developing an Action Plan for Membership *continued*

(7) When will the objectives and tasks be completed?

(8) What resources, financial and otherwise, are necessary for achieving each goal?

Date Exercise Completed _____

END-OF-MODULE CHECKLIST

Module 16

<i>Action Item</i>	<i>Date Completed</i>	<i>Notes</i>
Review content on developing more inclusive fundraising and membership development.		
Analyze the information gathered about fundraising and membership development.		
Determine whether there is work to be done on the organization's community relations and marketing, based on the information gathered. If there is work to be done, describe it in terms of goals and objectives.		
Develop an action plan to accomplish goals and objectives.		
Share the outcomes from your work with other key stakeholders.		

