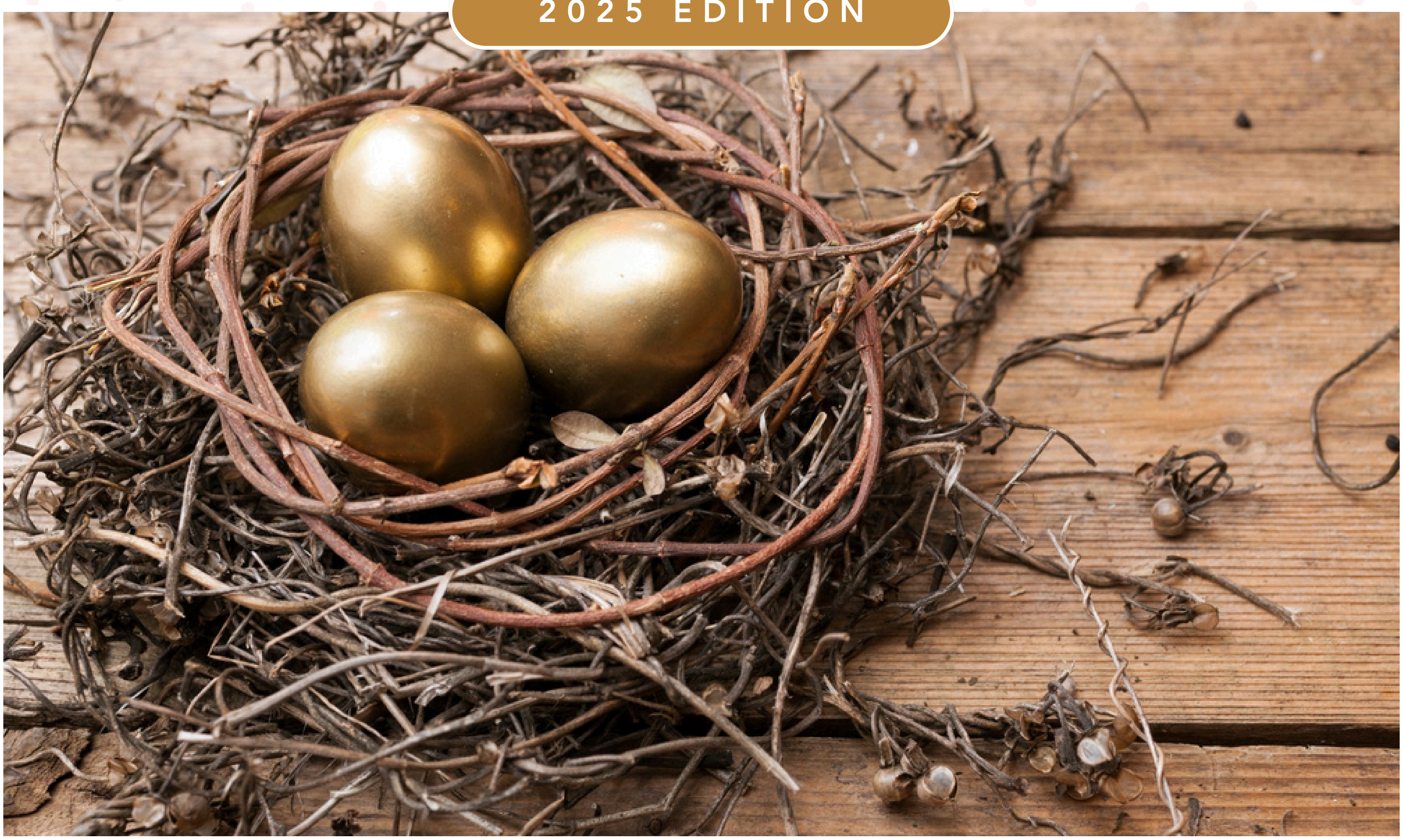
FUNDRAISING HANDBOOK

The Black Fox Global Guide to the Art + Science of Fundraising Mastery

2025 EDITION



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BLACK FOX GLOBAL

Fundraising is both art and science,
and with a wealth of experience on our side,
Black Fox Global has honed this craft.

This Fundraising Handbook is a collection
of our best practices, strategies and insights.

***Embrace the Awesome.
And share it widely with others
who seek fundraising success.***

YOUR MISSION IS OUR MISSION.

Black Fox Global is proud to be wholly woman-owned and a Certified B Corporation.

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WELCOME TO THIS OPEN SOURCE EXTRAVAGANZA!

Brand Promise

For nonprofits and social enterprises striving for deeper and more sustainable impact, Black Fox Global offers strategic, hands-on support to build capacity, attract aligned funding, and propel missions toward long-term, sustainable success.

What We Do

At Black Fox Global, we help you secure the funding your mission deserves. By pairing our proven methodology with a collective of dedicated , expert fundraisers, we maximize impact for our clients and their missions.

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FUNDER RESEARCH

UNCOVERING AND ENGAGING DEEPLY ALIGNED FUNDERS

Prepared by Julia Chacur, Research & Advancement Specialist; Laura Esterly, Communications Specialist; and Eliot Highet Patty, Research Specialist | Black Fox Global

Effective communication and prospect research aren't just buzzwords in the world of social impact fundraising: they are key to unlocking vital funding for your organization's mission.

We hear every day from clients who find the process of uncovering and connecting with funders to be daunting. In our Skoll World Forum webinar on April 11, 2023, Black Fox Global team members offered four steps – and an abundance of practical tips – for social impact and nonprofit organizations to think about when weaving prospect research and communications together to achieve impact.

Black Fox Global approaches the work of uncovering and communicating with potential funders in an integrated way with a multi-person team, but you don't need dedicated staff to find potential donors or create communications unique to your organization. Here are four steps to help you along the way.

1. The first essential step to successful funder matchmaking is to understand your organization's identity, or your WHY.

One of our core beliefs at Black Fox Global is that organizational storytelling is the driving force in building powerful connections with funders and motivating action.

Effective storytelling invites funders to be part of the solution, while inspiring empathy, and communicates shared values, ideals and truths. Your mission, values, profile and strategic goals are key to developing a successful fundraising strategy.

In developing your WHY and thinking about funder-specific communications, it helps to understand what funders want to know:

- Your connection to the problem. What originally drew you to this work?
- What was the most exciting for you in the early days of this work?
- Your unique vision. What's at stake if you don't solve these issues? What do you find most compelling about your mission?
- Your approach. Why are you the organization to solve the problem? Do you have the capacity to do this work?
- Your impact. If you have data, what story is it telling? What kind of data are you collecting now, or what would you like to collect in the future?

We recommend developing a set of Core Messages in three categories: Who You Are, What You Do, and How You Do It, to help refine your answers to these questions. (To explore Core Message development in depth, see this article by Rosie Urbanovich).

2. Second, you'll want to approach your prospect research in an organized, strategic way to identify potential funders aligned with your mission and vision.

Thorough research helps optimize and maximize all the next steps of your fundraising cycle, so be sure to set aside time for it.

To start identifying the first prospects, we suggest you look into peer organizations' funders and always keep on top of news, articles, and insights from the sector. It's also a great idea to mobilize your supporters and current donors to ask for introductions to new foundations! Some ideas of where to start researching include:

- Websites
- Annual reports
- 990s / Relevant grants
- Social media posts
- Internal blogs
- Founders and staff biographies
- Relevant event, webinars, etc
- News and articles
- Peer organizations annual reports
- Grant finder tools

Don't be afraid to be creative to find out what you need!

Keeping your research organized is essential to help you move to the next stage of connection. One simple structure you can develop to organize your research is a Funder Profile.

Creating Funder Profiles allows you to quickly understand:

- Eligibility: areas of interest, grantee requirements, and geographic focus
- Vision, mission, values, and programs
- Funding approach and priorities (systemic change, direct services, grassroots activism etc.)
- Other relevant points (grant size, multi-year, in-kind contributions, seed funding etc.)

Tracking your research in a way that works for you and your organization will ultimately help you refine your communications and partnership.

Now that you know what the funder is looking for, you can ask: Why is the Funder a Fit for us? You will want to create a rationale for why you are aligned. Take into consideration:

- What are the strongest points of connection?
- Can you mobilize the funder's language to express that alignment?
- What evidence can you point to to back up this connection? News items, past grants, funder specific program goals?
- Can you highlight your points of entry?

3. As you identify your key prospects, identify your next steps: understand the application process, and plan your outreach strategy.

Next steps will be both ideological – thinking through your areas of alignment with funder prospects, for example, and practical – creating an action plan to determine which communications you can focus on to emphasize the potential of partnership.

4. Your last step will be bringing your research and messaging together to craft a compelling story of partnership & alignment with funders.

Whether you're planning to create talking points, a pitch deck, letter of introduction, a Case for Support, or another engagement piece for a funder – you'll have language at your fingertips. In fact, no matter what communication you're planning, relying on core messages and following this up with examples and detail helps ensure you're telling a fluid, cohesive story, and setting up your organization for success with funders.

Further resources for Prospect research tools:

- Fundsforngos (free)
- Climate Funding Bulletin (free)
- Grantmakers.io (free)
- Foundation Directory Online (paid)
- Inside Philanthropy (free and paid versions)
- Instrumentl (paid)
- Blackbaud (paid)
- Candid (free and paid versions)
- Terra Viva Grants (free)
- Funds4NGOs (free and paid versions)
- GrantNav (free, UK focus)
- UK Government Charity Navigator (free)
- Fundraiso (free and paid versions; UK, Switzerland, Germany, Liechtenstein, Austria and other EU countries)
- Justice Funds Newsletter (free, Global South-focused)

For more information on how Black Fox can help you develop a pipeline of deeply aligned funders, visit the Solutions page of our website.

TOOLS & STRATEGIES | IDENTIFYING & QUALIFYING DEEPLY ALIGNED FUNDERS | PART 1

Prepared by Julia Chacur, Research & Advancement Specialist; Wonu Owoade, Research & Advancement Specialist; Elena Villanueva, Research Specialist | Black Fox Global

Solid prospect research helps lay the groundwork to build relationships with the right donors for your organization. Beyond identifying donors who work in the same issue areas or geographies as your mission, quality prospect research helps you find donors who seek to create impact in complementary ways – this is the foundation for strong partnerships.

As part of the Catalyst Now Fundraising Toolkit Masterclass series, Black Fox Global hosted a session on January 22, 2025 titled "Tools for Identifying Potential Donors." Team members Lisa Heinert, Wonu Owoade, and Julia Chacur shared their tips on how to shape funder research priorities and criteria to assess funder fit and uncover the information your organization needs to support this step in the fundraising process.

The January 22, 2025 session recording can be accessed here, and the slide deck is available here.

Preparing to Research: Establishing Your Priorities and Criteria for Funder Fit

Before conducting funder prospect research, it is important to establish the priorities and criteria that will guide your process. This helps you understand what to look for and keeps you focused when sifting through large amounts of information. It allows you to more easily identify when a funder is a good fit, versus when they are not a good fit and should be ruled out. In this way, you can be more efficient and strategic with the time you invest in your research, as well as in your donor outreach and cultivation process.

1. Know and Anchor in Your 'Why'

In the flood of information that exists about funders, it is easy to hyper focus on keywords, program areas and eligibility criteria (which we recommend looking into later in the process, and we offer guidance around this later in this blog).

However, it is also important to remember that the best funders for your organization are those who are mission-aligned, values-aligned, and seek to create impact and solve problems in similar ways. While criteria such as program areas and geographic priorities help narrow funders to consider, this deeper level of mission, values, and impact typically leads you to the most deeply aligned donors, and that will help you establish the type of connection that builds strong partnerships.

Before diving into your research, be clear about your mission and your "why". Why are you in this work and what problem are you trying to solve? Why is your organization the one to solve the problem, and why in this way? Knowing your "why" helps you see when a funder's "why" resonates with yours. Beyond this, it also enables you to understand how to position your organization and develop strong communications for funders that tell a compelling story of your work and why it matters.

For additional guidance on understanding your organization's WHY, take a look at "Uncovering and Engaging Deeply Aligned Funders" and "Connecting Deeply With Donors | Crafting Your Why". Black Fox Global can also support you directly in these efforts with our Communications Toolkit service.

2. Organizational Assessment

Another area to have clarity before starting your research is information related to eligibility criteria that funders typically list for grant opportunities. We recommend assessing two key criteria: your organizational budget and your organizational status.

3. Identify your Research Priorities

The next step in preparing for prospect research is to set your research priorities so you know what you are looking for, what you are not looking for, and what types of funders and opportunities fit your needs and context. Here are some key areas to consider:

- Geographic Focus: Where is the work you seek to fund happening, and at what level (e.g. local, regional, national, international)?
- Funding Priorities & Needs: What programs or organizational goals are you seeking to fund (e.g. an existing program, a new program, an expansion, research, general operations, etc.)?
- Preferred Grant Characteristics: What are your preferences regarding the type of funder (e.g. foundation, corporation, local funder, international funder) or the type of grant (e.g. unrestricted, programmatic, capital expenditure)? What is the minimum grant size you are willing to pursue?

- Donor Exclusions: Which donors should you exclude from your research so you know not to spend time looking into them if they come up (e.g. current donors, lapsed donors, donors with potential conflicts of interest)?
- Restrictions to Types of Funders/Industries: What are your ethical no-go's regarding the industries funders operate in, their beliefs and practices, and where their money may come from (e.g. alcohol companies, tobacco, gambling, etc.)? What due diligence considerations does your organization follow that would affect how you look into an opportunity (e.g. a small grant with extensive application and/or reporting requirements)?

4. Identify your primary and secondary issue areas and demographics

In addition to prioritizing your list of funding needs, it is also helpful to think about your work within the broader funding landscape and know what types of 'buckets' your work fits into. This includes identifying your primary issue area(s) and secondary issue area(s) to help you navigate funder programs, focus areas, and different aspects of the broader social sector. You can think about:

- What are your primary thematic priority areas (e.g. health, poverty alleviation, education, women's empowerment, civic engagement, etc.)?
- What other areas does your work impact (indirectly) but also achieves impact (secondary issue areas)? For example, you may have a water, sanitation and hygiene (WASH) program that has an indirect or secondary impact on improving school attendance or women's empowerment in rural communities.
- Who are your target groups (direct and indirectly)? For example, your primary target group may be mothers, but the indirect target group is their children or the larger community.
- What are the age ranges and demographics of your target groups (e.g. children, youth, rural, peri-urban, migrants, etc.)?

Our team at Black Fox Global often uses the United Nation's Sustainable Development Goals (SDG) as common language for our clients, but you may have other ways to organize and articulate your primary and secondary issue areas. The important thing is to have clarity on these as you look at potential funding opportunities.

The Research: Identifying Deeply Aligned Funders

Once you have completed your research preparation and set your priorities and criteria, you are ready to conduct your research.

- Where to start

The first step of the research process is to surface leads on potential funders. This is where knowing your primary and secondary issue areas, demographics, and priorities like geographic focus can be utilized to provide keywords for searches. Below are four key avenues that we recommend looking to initially identify funding prospects:

- Funder lists of peer organizations

This is one of the strongest sources of leads and a great way to see who is in your space that is not yet funding you. Approach this by looking at peer organizations' websites, annual reports, and Form 990s (if they have US 501c3 registration status)

- Sector trends and insights
  - Inside Philanthropy
  - Alliance Magazine
  - Black Fox Brief
  - Devex
  - Stanford Social Innovation Review (SSIR)
  - Chronicle of Philanthropy

- Attendees and speakers at convenings and webinars of interest
  - See Black Fox Global's "2025 Sector Convenings" list

- Open grants and donor databases
  - See our curated list of tools and databases here

Once you have an initial list of funders to consider, the following steps will help you determine alignment, create a funder profile, and set you up for strategic outreach.

Assessing funder fit

The bulk of the prospect research process is obtaining the information you need to assess funder fit guided by the priorities and criteria that you have set, and to build later your strategy for approaching the funder and developing compelling outreach. We recommend assessing this information to gauge alignment with your priorities and criteria:

- General overview, mission and programs
- Geographic priorities
- Type of organization and eligibility (organization size, registration status, leadership profile, etc.)
- Funder's giving capacity
- Values alignment

As you look into this information, we also recommend looking with a critical and strategic eye and noting down key points about why the funder or funding opportunity is a fit and aligns with your mission and objectives. This will ensure that everyone on your team understands the strategic importance of the relationship and helps craft your strategy and compelling outreach. Guiding questions include:

- What are the strongest points of connection?
- Can you mobilize the funder's language to express that alignment?
- What evidence can you point to back up this connection (e.g. news items, past grants, funder-specific program goals)?
- Where do you see your points of entry?

Finding funder information

To find the information you will be assessing, these are great places to look:

- Funder websites (Key sections: About Us, Programs/Priorities, FAQ, How to Apply/How We Fund, Grants Database)
- Funder annual reports
- US Form 990
  - A United States Internal Revenue Service (IRS) form that provides the public with information about nonprofits and foundations, which includes basic information on grants (more details on how to read a 990 can be found in this Candid article)
- Additional insights:
  - Founder story and biography
  - Staff biographies
  - Social media pages
  - News and media mentions
  - Grantee and peer organizations' annual reports (may include more information on what a funder's grant was used for and the nature of the partnership)
- Online tools and databases
  - See our curated list of tools and databases here
- It is important to note at this stage in the research process that qualifying funders as 'not a fit' or only 'well aligned' is as critical as determining those who are 'deeply aligned'. Gaining this clarity will ensure your outreach is focused on the right funders with the highest likelihood of funding your mission. With these funders identified, now is time to build out a funder profile so you are set up for strategic funder outreach.

Building a donor profile

As you look at and collect all of this great information, it is important to organize it into a donor profile. This profile should make it easy for you and your team to see a quick overview of who the donor is and what is important to consider in your outreach to them. You can store this information in whichever format or tool works best for your organization, such as a CRM tool like Salesforce, a project management tool like Trello, or an online collaborative workspace like Google Suite.

If you do not yet have a format for your donor profiles or are looking for a reference format, you can find a sample of a Black Fox Global donor profile used in our research work here.

Key Takeaways

- Before identifying your research priorities, be clear on your mission and values, and assess your organizational budget and status, as this could affect your ability to receive specific funding or work with particular donors.
- Once you have conducted your organizational assessment, identify your research priorities to narrow down your research and keep it focused.
- A key aspect of identifying your research priorities is to identify your primary and secondary issue areas; this helps expand your research pool for prospective donors.
- Consider starting your research by looking at the funders of peer organizations.
- Keep up with sector trends and insights to help identify potential funder leads.
- Use the research process to qualify funders as 'deeply aligned', 'well aligned', 'not a fit', and 'not a fit right now'
- Create and update donor profiles to organize the information, quickly see alignment, and prevent the loss of important information over time.

For more information on how Black Fox Global can help you develop a pipeline of deeply aligned funders, visit the Solutions page of our website.

TOOLS & STRATEGIES | IDENTIFYING & QUALIFYING DEEPLY ALIGNED FUNDERS | PART 2

Prepared by Julia Chacur, Research & Advancement Specialist; Wonu Owoade, Research & Advancement Specialist; Elena Villanueva, Research Specialist | Black Fox Global

Fundraising is a resource-intensive process. Every nonprofit organization aims to have funding partners that align with their missions and values, and provide the type of support needed to fuel their impact. A strong foundation for this process is solid prospect research that enables you to identify the best prospective partnerships and be strategic about how you use your time and resources.

This article aims to dive deeper into how to conduct effective prospect research to determine when funders are deeply aligned with your work and goals, and lay the foundation for your application, outreach, and relationship building efforts.

Developing your criteria for fit and deep alignment

Just as funders can have their own criteria for how they evaluate potential grantees, we believe it is important for organizations to set their own criteria for evaluating potential funders given the amount of time and resources that can go into the fundraising process. We think that "fit" and "alignment" go two ways – how well does a funder and funding opportunity fit your work and goals, and how well does your organization or program fit their work and goals? This allows your prospect research to be strategic and efficient, and set yourself up for success.

In a previous article, we shared a few things that go into establishing your own criteria for funder fit in preparation for research: your organization's "why", conducting an organizational assessment, identifying your research priorities, and identifying your primary and secondary issue areas and demographics. To further facilitate your prospect research and get a full profile of a prospective funder, one consideration is to divide your criteria into two categories:

1. Criteria for basic fit

What are the minimum criteria that need to be met before you will consider looking into and investing time on a funder? Often this entails:

- Aligned mission
- Aligned issue area(s)
- Same geographic focus

- Available type of funding matches preferred funding type (e.g. general operating support, program funding, project funding, etc.)
- Meets your minimum grant size
- Match the funder's eligibility requirements (e.g. budget size, organization status and registration)
- No ethical red flags (e.g. industry, practices, or values you do not align with)

2. Criteria for deep alignment

What are the indicators that a funder is deeply aligned with your work and your funding goals, and is worth investing a good amount of your time and resources in? These can be:

- Aligned values and approaches to addressing the problem
- Aligned vision of impact or change
- Grant history shows evidence of giving to similar programs or organizations
- Matches your target grant size and type
- Offers the type of partnership that suits your organization

With these criteria, you can create a checklist for yourself and a template for donor research that will help you keep track of the information for reference. Beyond information that tells you about fit and alignment, you will also want information that allows you to build your funder strategy and next steps. If you need a sample template for your donor research, here is one we use at BFG.

Research to identify basic fit

Once you have set your research priorities, your criteria for fit and alignment, and your donor research template, you can dive into the research. This article offers information on some tools you can start with to surface names of funders and find funder information. When you have a funder to look into, you can start by checking pieces of information that are part of your basic fit criteria so you can assess if the prospect has potential. The main things to look at include:

- Mission and issue areas of interest
- Geographic focus
- Eligibility requirements & what is not funded

Need more guidance on what exactly to look for and where you should look? Check the "Basic Research" section of our Prospect Research Guide.

After looking into these main areas and any other information that you think is valuable to assess basic fit, decide first whether you deem the prospect a fit on a basic level and whether you think they are worth looking into further and investing time on. Keep in mind it is equally important to know when a prospect is not a good fit, so you can focus your time on opportunities with strong potential rather than those where you are not set up for success.

Research to determine depth of alignment and build your strategy

Once you have determined that the funder meets your basic fit criteria, you can invest more time and brainpower into understanding how deep the alignment is, where your synergies are, and what you should consider to build your strategy for the funder. This includes assessing the following, and anything else you have set out as part of your criteria for deep alignment:

- Programs, Funding Strategies & Funding Motivations or Rationale
- Recent, relevant grants
- Giving capacity
- Application process
- Contact information

Refer to the "Advanced Research" section of our Prospect Research Guide for more tips and guidance around what to look for, what to keep in mind, and where to find needed information relating to these topics.

Putting it all together

After looking into and compiling all of this information about the prospective funder onto your donor research template or donor profile, we recommend summarizing in one paragraph or a few lines why the funder is a fit and how deeply aligned they are. This step not only helps you clarify your assessment of how good the prospect may be for your organization, but also provides something you can share with others in your team or even your board members who want an overview of the opportunity.

Beyond this, you can also create another summary or a few bullet points on what your recommended next steps for pursuing the prospect may be. You can consider:

- Is there an application window you can submit an LOI or proposal for or is the process invitation only, which would require some conversation and relationship building before you can get that invitation to apply?
- If you need to build your relationship, what are the best ways to get in touch, and who are key contacts you should get in touch with? (If you need help figuring out your next steps and strategy from here, we have an array of resources related to relationship advancement)
- Is there anything that should be highlighted or asked when speaking with a key contact or writing an application?

For more information on how Black Fox Global can help you develop a pipeline of deeply aligned funders through solid prospect research, visit the Solutions page of our website.

CORE COMMUNICATIONS

CONNECTING DEEPLY WITH FUNDERS | CRAFTING YOUR WHY

Prepared by Natalie Rekstad, Founder and Chief Executive Officer | Black Fox Global

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.

For our purposes here, this guide is written with an eye toward funder engagement, particularly as you prepare for conference season.

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 worthy 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 Leading the Donor Dance.

CONNECTING DEEPLY WITH FUNDERS | CRAFTING YOUR WHY

Objective: While all organizations have an overarching "engagement pitch," it is vital to develop a narrative around why this work is uniquely yours to do. This will assist in building rapport and the conviction that you personally align with your mission and are dedicated to solving the issue. This is a key element in ensuring the potential funder's faith in you as an ally in your shared vision.

The 'bite sized nuggets' you craft are meant to be openers to a deeper conversation about the work, and inspire a funder to want to learn more. It is vital to respond to these questions in ways that truly make you come alive in the conversation. While they are great for settings such as galas, luncheons, or serendipitously at convenings, your responses are also a good way to keep a sit-down meeting flowing with passion and connection.

Organizational "Why"

What I find most compelling about our mission is:

What is it about the mission that would resonate with the listener? If you've had time to do research before the conversation, shine a light upon how your work dovetails with how the funder also thinks about impact.

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

This is a chance to illustrate how your work is worthy and deserving of financial investment because you are doing something unique and effective. This is a chance to own your Awesome.

Why that matters is:

Why is the attribute a powerful differentiator in terms of fulfilling the mission? Focus upon this aspect of your approach vs. pointing to any perceived lack in peer organizations.

What makes our organization/mission worthy and deserving of being significantly funded is:

This is a more straightforward claiming of your organization's worth and effectiveness. State your response with conviction and confidence.

Personal "Why"

The mission of (organization name) is personally significant to me because…

Why is this work uniquely yours to do? Why are you (not just your mission) worth investing in? Don't hold back! Own your power and worth. It's not ego but instead it's about stepping into your power as a worthy and deserving leader who is bringing about deep and lasting change.

Consider: Our deepest passions often spring from our deepest wounds. Is there something in your personal journey that would lead you to care so deeply about your mission? Or your commitment could come from a place of gratitude, a call to action rooted in the desire to give back; what was the original inspiration behind this?

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

This guiding sentence is designed for those who have less comfort sharing their personal why, but have access to the emotion of frustration. Frustration and anger can be powerful drivers toward change.

What was most exciting in the early days of this work was:

Illustrate the early passion for the work and why it became a 'bodysnatcher', but not leave it there. The follow-on sentence below should take the listener to the present moment, and serve as an invitation to share in the organization's evolution and excitement for its trajectory and potential.

But what's most exciting now is:

Again, this should take the listener to the present moment and the organization's potential, and serve as inspiration for the listener to invest in making this potential a reality.

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

In an internal team setting, or board retreat, share what you feel is most resonant/significant about the work that has been done thus far.

What has been transformational for me about being involved with (organization name) is:

Take the listener on a journey of transformation that can also serve as an invitation to their own transformation.

The story of our impact that most touches my heart (or blows me away) is:

This is the time to share one or two stories that powerfully illustrates your work. Weave in emotional texture, highlight specific people or communities that have benefitted and the ripple effect of these positive shifts.

Ideally what you share has some resonance with the listener, so if you have time to prepare in advance be sure to do your homework. You can name their funding priority that focuses upon the same outcome(s) your story illustrates, and share that you too care deeply about this level of transformation.

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

This is an opportunity to share more stories that have emotional resonance for you, but also clearly illustrates the power of your work and its results.

My ultimate vision for our impact is…

Where does your vision for a better world dovetail with the funder's? If it is true to say it is your ultimate vision, name it. If not, you can modify the question to: "A key aspect of our vision is…" so that you are authentically illustrating your vision-alignment.

Note: 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.

CRAFTING CONVINCING FUNDER-CENTRIC COMMUNICATIONS

Prepared by Rosie Urbanovich, Communications Specialist | Black Fox Global

For organizations seeking greater impact, the inability to communicate your work in a way that inspires significant funding can be a major pain point. One of our core beliefs at Black Fox Global is that organizational storytelling is a driving force in building powerful connections with funders and motivating action. Effective storytelling invites funders to not only be part of the solution, but inspires empathy and communicates shared values, ideals, and truths.

Crafting your organization's messaging with funders in mind can feel like a daunting endeavor. At Black Fox Global, the approach we take to organizational messaging can be distilled to a three step process, as experienced in our Communications Toolkit. In this article we aim to summarize our message development process for you.

But before we dive into our process: let's first consider what funders are actually looking for in your communications.

What are funders looking for?

1. A personal connection to your mission:

We talk about effective fundraising speaking to both the heart and mind, and developing your personal connection to the work really speaks to the heart. So how can we get closer to our personal driver in this work? Some questions you can ask yourself or your team to help facilitate this narrative and personally connect you to your mission include:

- What originally drew you to this work?
- What was the most exciting for you in the early days of this work?
- What impact are you most proud of?

See "Crafting Your Why" for more guidance on connecting your personal story to your fundraising.

2. Unique Identity: Why this work is uniquely yours to do

This leads into your organizational 'why' or why this work is uniquely yours to do. Some of these questions for you, for your team or for your board, can include

- What do you find most compelling about your mission?
- What's at stake if you don't solve these issues?
- What sets you apart from other organizations doing this work?

3. Credibility: Why you are the organization to solve the problem

While the previous points are really about speaking to the funder's heart, credibility speaks to your organization's capacity to do this work. This is the mind piece and is often factual and objective. Questions that will help you frame your credibility include:

- What are the tangible resources you have available to you?
- How about the unique expertise of your leadership, Board, and staff members?
- Where else have you received funding? Mention past grants from foundations and organizations, as this speaks volumes to your accountability and your credibility to do this work.

4. Impact, Impact, Impact!

Lastly, data, as to be expected, is overwhelmingly important to complement your storytelling. Surveys and reports throughout the social sector name impact as one of the top three, if not most important considerations for funding.

Many early stage organizations only track what they're accountable to their current donors for based on your current grants. If you are looking to engage new funding sources, it's important to be able to create a cohesive narrative around the data you have. Even if you're not at a stage to invest in robust data collection, begin to think through the metrics that can speak to your work. For both donor-facing communications as well as for your own measure of employee accountability and organizational progress, it is important to articulate what these metrics are.

The Black Fox Global Message Development Process

Now that you've answered some fundamental questions related to fleshing out your organization's narrative, we can move on to creating a funder centric engagement pitch.

Many of you will already know the traditional formula for nonprofit communications is centered around problem-solution-impact. But when we're thinking about funder-centric communications and setting our clients apart from the other wonderful organizations doing similar work, we find that building messaging around three categories – Who We Are, What We Do, and How We Do It, is more conducive to building an organizational story which we know goes further with funders.

Once these fundamentals of identity, work, and approach are articulated, we're then able to go back and tell the problem-solution-impact story with greater precision – as well as draw stronger connections to those universal themes that drive action and connection.

Identity: Who We Are

This first bucket is really about your core philosophies, beliefs, and values – and possibly your origin story if you feel this is relevant to your work today. Within this section, we also push clients to be very clear about where they belong in the "ecosystem"- it's just as important to define who you are not as who you are. Are you a systems change organization, or do you purely exist to deliver programs or services? It's important to have clarity about your identity and what you're looking to achieve.

When developing your identity messaging, keep in mind:

- Make a clear distinction between identity and work: introduce yourself first, before going deeper into your vision.
- Demonstrate guiding philosophies, values, and core beliefs.
- Define where you belong in the "ecosystem."
- Start with a descriptor. Are you a network, ecosystem builder, convener, collaborator, or a social impact organization? Find a descriptor that feels unique and relevant to you.

Work: What We Do

Next, we move into looking at What We do, or your organization's work. In this section, we focus on your organization's aspirations – not your programs or approach just yet! Your" What We Do" should be inclusive of the problem you are solving and the outcomes you will be creating.

In other words, think of this bucket as a mini, compressed theory of change, which shows how you expect outcomes to occur. When you are describing what you do, this is really focused on goals, outcomes and aspirations. We are not yet talking about the specifics of the nuts and bolts of your programming. Here, you are describing your work but not yet your approach.

The role of aspiration is really key in making this distinction. This is where mission and vision meet action. The 'what do we' piece helps a funder or supporter truly connect the dots between your vision and your programming.

Approach: How We Do It

Lastly, this bucket outlines your unique approach to the work. While there are many organizations addressing your issue area (and who may even share the same vision as you!) you are the only one doing so in a particular way. This section should outline your real point of difference and distinguishing features as an organization.

Some key considerations to look out for when building out your approach include:

- Rules of threes: Can you summarize your work in three categories?
- Be very selective with industry or academic jargon.
- Focus on accessibility and readability. These should be clear, succinct, and even able to read out loud if needed.

While the problems that you are working on are nuanced and complex, by doing the difficult work of message development for your organization, you can define the problem in a way that the donor sees a direct line to you as the solution.

Once you're done crafting the primary messages, at Black Fox Global, we progress to secondary messages or talking points. These messages add color, dimension and detail to what you have already done with the primary messages. You can pick and choose these talking points depending on what funder you're in conversation with, or proposal you're working on.

With the primary messages and the talking points, the hardest part is over! At this point, you have what you need to tell a compelling organizational story.

The full elements of Black Fox Global's Communications Toolkit includes core messaging, talking points, a pitch deck, email templates, telephone talking points, an engagement letter, and a comprehensive Case for Support, for you to use as needed with funders.

Black Fox Global's Communications Lead Rosie Urbanovich is featured in a Masterclass produced by Catalyst 2030 discussing these concepts; the recording from the session is available on the Catalyst 2030 Youtube channel.

Additional resources:

A sample full Fundraising Communications Toolkit by Black Fox Global for Launch Girls (with permission).

A sample full Fundraising Communications Toolkit by Black Fox Global for Casa Gallina (with permission).

Learn more about our Fundraising Communications Toolkit offering here.

INCORPORATING ETHICAL STORYTELLING INTO YOUR COMMUNICATIONS

Prepared by Rosie Urbanovich, Communications Specialist | Black Fox Global

At Black Fox Global, we are also always striving to incorporate concepts around ethical storytelling as we develop messaging alongside our clients.

Within the field of ethics, there is the overarching idea of 'do no harm.' No matter how many academic theories and concepts we can apply to philanthropy and the social sector, this idea to do no harm is prevalent throughout all of them. If we are nonprofits or NGOs working directly with grassroots partners, organizations and communities, especially communities with lived experience of the issues we are working on, it's essential we take this concept of doing no harm into our messaging.

Our communications outputs may be the only authentic content audiences see of a local community. While this is a powerful thing, it also means we must always strive for accurate representation of a community, amplifying the voices of the groups and people we are working with in an ethical way.

While the concept of ethical storytelling and ethics in philanthropy is far too complex to drill down within this article, we wanted to outline a few general pointers about ethical communications that our team keeps in mind.

Framing: What is framing and what does it have to do with ethics? Framing essentially shows how language and experiences bring to mind certain associations, and how these associations can then change the way we think and feel about something. Here's a quote from a UK-based organization Health Poverty Action from their resource: Communicating Justice and Solidarity: "An understanding of framing helps us consciously examine our communications for potentially unseen harm they may be doing and seek more helpful alternatives. Language is key to creating change and showing that it is possible."

Therefore, this isn't just about specific language, but about how we're using words and in what order, how we employ images and how we structure our sentences. So what are some practical ways we can underpin ethical framing in our communications?

We can avoid othering. "Othering" means using language that distances another group from ourselves, in other words creating an "us" and "them" dynamic. It can be subtle, but it can also explicitly paint the picture for an audience that they are victims and we are the heroes. Whenever we create messages, we should strive to be as inclusive as possible with all of the actors we are communicating about, highlighting the similarities between us and others, instead of the differences.

How can we do this in practice? We actively bring people INTO the frame. So, instead of saying "poor people'' or "sick people," we might say "people experiencing poverty" or "people denied access to healthcare." While subtle, this immediately bridges the gap between us and them, and does not conflate circumstance with identity.

One additional consideration when discussing the concept of framing is ensuring that we avoid presenting our organizations as isolated entities acting alone, but instead focusing on collective action. This can be as simple as using words like WITH or ALONGSIDE. Instead of 'donate now and help end poverty in Bangladesh,' say: we are standing with women in Bangladesh as they work to tackle poverty in their communities.' This is not only avoiding problematic frames, but painting a fuller picture for your audience and funders. Changing the framing doesn't eradicate our role, but it shows audiences and funders we are invested in long-term, sustainable change, while respecting the autonomy of the communities we are working alongside.

Language: There is a lot of language within the charity and aid sectors that can be disempowering to the communities and partners we're working with, so it's essential to be intentional about how we use these words in practice. Avoiding victimizing the communities we are working alongside and being conscious about how and when we use language around aid are all concepts we keep in mind when we work on client messaging. For example, we are not giving people a voice, we are ensuring voices in a community are heard.

This also applies to images. We likely have all heard the term poverty porn or development porn, the type of fundraising imagery that presents people and communities as vulnerable or unable to help themselves. As fundraisers, we know this might bring in short-term donations, but overall it can do more harm than good long-term. It's not only unsustainable, but it strips people of their individual autonomy and dignity. Those two concepts are two of the most fundamental concepts in the field of ethics.

If you're interested in reading more about these concepts, here are some guides we have learned from:

A Practical Guide for Communicating Justice and Solidarity, Health Poverty Action

Framing Equality Toolkit, ILGA Europe

Learn more about our Fundraising Communications Toolkit offering here.

MAXIMIZING OPPORTUNITIES FOR FUNDING

Prepared by Jennifer Skala Bodio, Communications Specialist; Lisa Heinert, Chief Operating Officer; and Hamsini Ravi, Communications Specialist | Black Fox Global

In our Fundraising Masterclass, "Building Authentic Funder Relationships & Maximizing Opportunities for Funding", held during Catalyzing Change Week 2024, Black Fox Global team members Lisa Heinert, Melizsa Mugyenyi and Jen Skala Bodio explored ways to build authentic funder relationships through professional persistence.

Building on this strategic fundraising approach and the parallel importance of funder outreach and messaging, our team also shared tried and true strategies to ensure your organization is 'grant ready' when you do secure invitations to submit proposals and letters of inquiry (LOIs). This blog post is the second in a two-part series following this Masterclass. The session recording can be accessed on Catalyst 2030's YouTube page here, and the slide deck is available here.

Developing Grant Ready Communications

As a result of your professional persistence in funder outreach, you will have leveraged and/or developed warm leads and strong funder relationships. In view of this, it is pertinent to be 'grant ready' to avoid last-minute grant applications or rushed letter of inquiry (LOI submissions). In addition to other important factors such as organizational structure, board development, policy development, and more, one key is to ensure that your communications are clear, concise, and compelling before you actually do the grant writing. We will focus on this aspect of grant readiness.

Here are three communications-focused questions to ask yourself before you apply to a grant:

- Do we have clear messaging?
- Is our language/ message aligned with the Funder's focus areas?
- Do we have the right materials prepared?

Step 1: Plan Clear Messaging

Your messaging forms the building blocks for all other communication materials, and consistent, clear, and compelling communications allows a funder to easily understand the heart of your work, and the alignment with their funding priorities. At Black Fox Global, our Communications Toolkit process adapts the sector's Problem-Solution-Impact model by implementing a three-part system that focuses on your identity, your vision, and your model or approach.

Using this process will enable you to develop authentic messaging in a way that captures who you are, what you do, and how you do your work. It is important to avoid jargon and academic language in materials, and remain accessible. Your core messages should be common across all the funders you reach out to, in a commitment to stay true to your organization's values and identity.

Step 2: Demonstrate alignment between your message and the funder's priorities

In this step, it is important to do your homework very carefully on the funder. What particular phrases are they using to describe their approach? What specific details do they put out in their calls for grant applications? Can you weave this into your case for support or program description? Can you articulate your impact in a way that demonstrates what is important to your funder? In this step, it is also crucial to stay true to who you are as an organization, while highlighting commonalities between you and the funder.

Step 3: Prepare the right materials in advance

Preparing, gathering and collating materials, so that you are ready for grant applications, will take the mental load off your development and program teams, save time, and result in strong submissions to funders. Commonly requested documents and materials by funders may be organizational, financial, and narrative. You will find that you have many of these materials across your organizational assets, but organizing them in one place will ensure accuracy, consistency, and most importantly, save you time and energy.

Our team at Black Fox Global identified 25 different documents/pieces of information commonly requested for grant applications, compiled in this grant readiness checklist. This checklist complements the narrative work that our team does through our Communications Toolkit and Grant Suite services, and should similarly complement your internal messaging materials. It is not designed to be prescriptive for every organization, but rather a consistent list to consider. Based on your organization's size, the geographic location of your work and/or funding prospects, your specific registration status, etc., you may eliminate or add items to the list.

We encourage your team to review this list together, determine which items are most relevant to your organization, and use the checklist to compile all documents in one centralized location for easy access for upcoming funding opportunities. The document is designed to be copied to your own files; consider creating a separate checklist for each funder, or for new funding prospects to ensure you have 'checked all of the boxes' for your applications.

Our team at Black Fox Global wishes you the greatest success in maximizing the funding opportunities available to you. If you are interested in exploring how Black Fox Global can help you advance your fundraising momentum, please visit our Solutions page, and Open Source materials. May you feel encouraged and equipped to secure the funding needed for your vital mission!

The recording from the session is available on the Catalyst 2030 YouTube channel here, and linked here is the slide deck. Part 1 of this series, Building Authentic Funder Relationships is available here.

RELATIONSHIP ADVANCEMENT

LEADING THE DONOR DANCE | CHOREOGRAPHY THAT TRANSLATES INTO DEEPLY ALIGNED FUNDERS

Prepared by Natalie Rekstad, Founder and Chief Executive Officer | Black Fox Global

A great deal of the underpinning of this approach to engaging funders was borne out of the Sandler Sales Institute methodology, an integrity and win-win based sales approach. It has been adapted to the impact sector in collaboration with the Sandler Sales Institute.

Designed for Institutional Funders & Individual Funder Prospects

This process increases the odds of great outcomes through a system that connects you deeply to 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.

Note this level of document is intended as a "cut & paste" and "plug and play" approach for the novice to the more experienced fundraiser, including board members.

Craft your approach based upon your understanding of the funder's giving history and known priorities, but with openness and curiosity around what would expand and deepen their giving to include your organization.

Cull the questions and add more questions to create a bespoke choreography for each respective funder based upon your experience and personality as a fundraiser; your lived experience should inform and enrich this living document.

Note: The spirit of this document is to help reveal the funder's strategic approach, and their "why"/heart for the issue area. Sharing your own "why" you care deeply is also important as you discern if a deeply aligned collaboration makes sense from both sides. While one-off gifts are fine, the ultimate goal is to develop deep, effective, and sustainable alliances that are based on a shared vision.

The following are foundational rules as you craft your approach:

Rule #1: Seek First to Understand, Then to Be Understood (Covey). Whether in conversation with the decision-making funder, or someone from a larger decision-making team, be genuinely curious about their story, and appreciate their philanthropic journey to date. When you ask your questions, deeply listen to their responses. Listening, not pitching, is the pathway to deeper engagement for both sides, resulting in greater emotional investment in you and your organization that often translates into greater financial investment and advocacy for your organization.

Rule #2: Know Your Funder. Foundation-giving priorities 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, you are a master researcher, and/or you have access to wealth screen databases. Go in with at least two nuggets of information to show the funder that you've done your homework, that you are focused upon them, and that you are genuinely exploring if their heart and priorities are a fit with how you approach progress.

Rule #3: Lead the Donor Dance with Questions. The funder 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 for the highest good of all. The suggested questions in this document can be omitted or altered, mixed and 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 on conversation flow.

Rule #4: Don't Respond Immediately. Take Notes. The answers they provide are specifically telling you how to engage them as your funding partner, but do so elegantly and at the right time. It may be in the initial meeting; it may be a much larger task that requires additional meetings, a formal written request and/or presentation, and other decision-makers.

Rule #5: Tie their Vision into your Case for Support. Reflect back to the funder what was shared as the key reasons for giving ("Let me see if I've got this right…." "Did I miss anything?"). Then, if aligned, share how your organization matches its 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 on in your work.

Rule #6: We're being cheeky ;-) Ben Zander says it best here. (Don't take yourself so seriously!)

Jumping into the choreography, the following outline is meant to be crafted based upon your personality while stretching your comfort zone. Callings call for us to grow into them, so lean into discomfort as you adopt this methodology.

A. Bonding/ Rapport

Build trust through shared experiences and shared vision around advancing your mission. Share why this is yours to do. Trust is something that is partly earned because your passion and your commitment to the mission is clear. Sharing your personal "why" you care deeply about the mission builds trust and loyalty. Refer to the "Crafting Your Why" worksheet to uncover key messages that make you come alive.
In short, to be most effective, you need to share your deep care and commitment to your mission 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 angles – to solve the issue(s) you all care about.

If rapport is strong right away and you intuit that it is safe to go into personal territory, then pose the question: "I can't help but be curious; is there something in your personal journey that inspires you to care this deeply about (issue area)?" If rapport evolves over the course of the meeting, then you can bring this question in later in a natural way. It allows you to step out of your 'roles' and into a more richly textured conversation about a vision you both care about.

B. Upfront 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.

- What inspired you to invest this time together in exploring mission alignment?
- We've set aside an hour; what are some of the things you hope to learn to feel confident this was a great use of our time together?
- I take a deep dive with our potential partners to understand their impact journey and approach to progress. Are you comfortable with my asking a number of questions to get clear on your vision and approach?
- After we've invested this time, we can decide together to move forward with the exploration. If we do decide to move forward, we can discuss next steps at the end of our time together. 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" or anything that shines the light back on your work. Instead, wait. You're gathering information now that will inform your presentation/case for support at the right time.
For each question, if you feel there is more to uncover that is important then you can explore it further with "Tell me more…"

Individual funders:

- You have a rich philanthropic journey; tell me about your gift to XX – what is it about the organization that inspired your engagement?
- You've also been incredibly generous with XX organization. What is it that inspires that level of investment?
- 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 organization in order to feel confident making a sizable investment?
- What do you require of the organizations you support (and/or serve)?
- Based upon my understanding of your priorities, (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?"
- What is your greatest funding amount given to other organizations, and what are they doing that inspires that level of investment?
- What does a typical financial gift look like when you engage with a new organization? What has inspired you in the past to make a stretch gift?
- Under what circumstances do you sunset funding an organization?

Other: 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:
- To what extent is peace-building/economic prosperity/food security/clean water/sanitation an aspect of your giving strategy?
- In light of the political landscape, peace-building has gained important momentum in the impact sector; is this something you've considered in your giving?
- In light of Sustainable Development Goal (SDG) 5, Gender Equality, being core to achieving all 17 of the SDGs, to what extent is achieving an gender-equal world part of your giving priorities?
- Is there anything I may have missed?

Institutional Funders:

- The approach of ________ Foundation has evolved with such intention over the years. Tell me about how you arrived at centering your focus upon _____ (name an element of their mission that dovetails with your mission).
- Your investments in realizing this vision have been significant. Tell me about your gift to (name a peer organization they fund) – what is it about them that inspired your engagement?

- You've also been generous with XX organization. What is it about them or their work that inspires that level of investment?
- What does a typical financial gift look like when you engage with a new organization? What inspires _______ Foundation to make a stretch gift as a first investment?
- Under what circumstances do you sunset funding?

Other: 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:

- To what extent have you considered peace-building/economic prosperity/food security/clean water/sanitation part of your giving strategy?
- In light of the global political landscape, peace-building has gained important momentum these past years, and ________Foundation has been a leader in this. What is your funding strategy that has been effective thus far? Where do you experience frustration?
- In light of Sustainable Development Goal (SDG) 5, Gender Equality, being central to achieving all 17 of the SDGs, to what extent does funding women-led organizations factor into your giving strategy? To what extent do you prioritize funding to organizations that incorporate and embody equality (and/or DEI/B, or whatever your organization's focus is)?
- Is there anything I may have missed?

D. VISION

People engage – to a large extent – based upon emotion, which is why identifying vision and/or pain points is so important in the courtship stage. This applies to all funders, whether a grant-making institution or individual. Without identifying and addressing the emotional link to your mission, the likelihood of an investment dramatically decreases. Help the funder realize the gap between where they are, and where they want to be, through curiosity and probing questions:

a. What is your ultimate vision for (the issue area you both seek to solve)?
b. What frustrations have you encountered in realizing that dream?
c. What has been your greatest success story thus far in realizing that dream? To what do you attribute this success? (Seeking answers that inform your case for support/presentation, such as great leadership, excellent execution, etc.)
d. What would be the ultimate contribution you see yourself having in realizing that vision?
e. What's at stake if the vision is not realized?

E. Decision Step

Your time is precious and a limited resource, so it is important to qualify or disqualify the funder candidate. Are they true prospects or just suspects? Does the funder make decisions on their own? Do they get help from colleagues, or a board, or in the case of engaging individuals, do they collaborate on decisions with a spouse? Do they think things over, are they data-driven, can a decision be made now? The goal is to uncover the following:

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

Sample Questions:

- If not published, ask: How do you typically arrive at a decision about what organizations to support? Do you get input from your spouse/family? Do you gain input from others, such as a board or colleagues? (Note: when husbands and wives give together, the checks are typically larger.)
- If I were to ask you today to make the transformational gift of $XX, what would you need to know to say yes?
- 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 feel confident working with us as a partner on this project?

F. The Funder Centric Case for Support

Weave in things they've shared, demonstrating you heard them and are tuned in to 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 slideshow with your live narrative (auditory learners), highlighting how their vision ties into your work. You can also use a video. In both cases, talk about the people in the slides/video. Tell behind-the-scenes stories of the people you are serving so the listener can connect with the human element while anchoring in your mission through storytelling.

Note: Many funders respond well to deadlines. It focuses on their passion and why you are doing what you are doing. Example: Now that the program has been a proven success since 2014, the vision is ___________ by 2028, a 3-year plan that needs a financial anchor now, someone like you who also cares deeply about (issue area).

- You could go further 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 in East Africa).
- This is how the communities we serve used to be (Stories/emotional textures of individuals who represent a larger population are most powerful, giving your audience someone to connect to and root for.)
- Because of partners like you, this is how they look today. (Stories/emotional textures of individuals who represent a larger population are most powerful.)
- By collaborating on this together, we can have XX impact within one year/3 years (urgent, tangible).

G. The Ask

Quite simply: "We want to join together in our shared vision of __________, and invite you on this journey alongside us." Make a specific dollar amount ask based on all you've uncovered. If you are not confident in a specific amount based on 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 on our conversation that realizing our shared vision of ___________ is profoundly important to you. What would it look like for you to…":

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

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

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

Send a short follow-up email thanking them for the exploration, and try to include an article of interest or some nugget, something that came up from your conversation that is not about your organization but places focus upon them and what they've shared as important to them.

Send a more formal follow-up email after the meeting to recap your understanding of the Funder's giving priorities. Advise them that this will be the framework for a formal proposal. Ask: "Have I missed anything?"

Recording a voice memo and emailing it is also high-touch, expressing gratitude and warmth for spending time with a kindred who cares as deeply as you do about the vision. Be sure to write in the body of the email that it is a voice memo, otherwise people may be wary of opening the attachment.

Note: Written proposal/grant submission should be based primarily upon these funder priorities unless there is a formal grant format you are to follow. Your responses in any format should tie in all you've uncovered that illustrates deep alignment.

Regardless of what a person commits at that time, if it feels right (rapport is strong), ask: What other potential partners do you feel should know about our work? Who else cares as deeply as we do about ________?

Would you be comfortable with my sharing you suggested we connect?

If rapport is extremely high, instead ask: If I were to draft a ghost-written short blurb about our work, would you be comfortable making an introduction?

NOTE: Customize, add, and delete questions based on the funder and the circumstances.

H. Declined Funder Response

If the answer is no, get clear on why you were invited to meet/submit a proposal, why they declined funding, and what opportunities may still exist in the future.
Share that you are always seeking to improve, and would like to gain more clarity via a 20-minute conversation. Sample questions:

- 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?
- What could I have done differently in our conversation to have arrived at a yes?
- On a scale from 1 – 10, where did we land in terms of being a fit with _____ Foundation?
- What would have made it a 10?
- We are always seeking to improve. What are a few of the core reasons you're not investing in us at this time? If we address these things while maintaining integrity with our approach, can we continue the conversation at a later date?
- Who else in the funding universe do you feel should know about our work? Would you be comfortable with my sharing you suggested we connect? If rapport is extremely high, instead ask: Would you be comfortable making an introduction?

Close with gratitude and a timeline for your follow-up communication (ideally within 24 - 48 hours).

RAPPORT AND CONNECTION | STRENGTHENING FUNDER RELATIONSHIPS

Prepared by Natalie Rekstad, Founder and Chief Executive Officer | Black Fox Global

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 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 "Leading the Donor Dance". 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 barriers to greater funding.

4) Make the donor feel confident in their investment in your organization, and poised to make more significant investments 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 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 engagement?

3. What do you find most compelling about our mission of _____________?

4. This generally works 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? Or: What is it that you've found most enriching about 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 is it about them that inspired that level of generosity?

14. Ask Options: a. What would it need to look like for you to feel confident and comfortable investing in (organization) at that level? b. What would it need to look like for you to feel inspired to make a stretch gift of $XX to (organization)? c. 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?

15. 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?

16. 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?

17. In your planned giving/estate plan, is our mission part of your legacy?

18. Under what circumstances would you include (organization) in your planned giving?

19. Under what circumstances do you discontinue funding an organization?

20. 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

21. As one of our most significant partners, we want to be sure our appreciation for your support is truly felt. How can we show our gratitude for you in a way that would really be felt by you?

22. What other funders do you feel should know about (organization)? Would you be open to making introductions? Or have me reach out and share that 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 timeline for your follow-up communication (ideally within 24-48 hours).

BUILDING AUTHENTIC FUNDER RELATIONSHIPS

Prepared by Melizsa Mugyenyi, Advancement Specialist; Lisa Heinert, Chief Operating Officer; and Hamsini Ravi, Communications Specialist | Black Fox Global

Too many nonprofit leaders feel frustrated and burned out, grappling with an unjust philanthropic system that seems closed off to people without access to insider information and connections. We get it, we have been there, and we work with clients everyday who strive to be 'seen' by funders for the uniqueness they bring to the table.

In our Fundraising Masterclass, "Building Authentic Funder Relationships & Maximizing Opportunities for Funding", held during Catalyzing Change Week 2024, Black Fox Global team members Lisa Heinert, Melizsa Mugyenyi and Jen Skala Bodio explored ways to build authentic funder relationships through professional persistence.

Building on this strategic fundraising approach and the parallel importance of funder outreach and messaging, the team also shared tried and true strategies to ensure how you can be 'grant ready' when you do secure invitations to submit proposals and Letters of Inquiry (LOI).

This blog post is the first in a two-part series following this Masterclass. The session recording can be accessed on Catalyst 2030's YouTube page here, and the slide deck is available here.

Building Authentic Funder Relationships

professional persistence
[pro·fes·sion·al per·sis·tence] verb

To pursue a funding prospect with clarity of purpose, strategic intention, authenticity, and finesse.

In fundraising, doors for funding opportunities often need to be respectfully opened by non profit leaders. At Black Fox Global, we deploy and advise our Advancement Outreach clients to use what we call 'professional persistence'.

To us, professional persistence in fundraising is having a clearly defined and informed goal, while persisting with an outreach strategy that centers on clarity of purpose, strategic intention, authenticity, and finesse. It also means that we don't advocate persisting for the sake of it, but in a manner that embodies organizational and individual values, and tactfully so.

We have broken down professional persistence into three stages:

Stage 1: Pre Engagement

In this stage, we focus on the why, the what, and the who. We begin with Uncovering Deeply Aligned Funders, a research-focused exercise to find the right funding prospects, based on mission, geographical, and eligibility alignment. It is also important to choose funders based on evidence of alignment. Have they funded missions like yours in the past? Where have their recent resources been deployed? Once funder candidates have been identified, it is important to set eyes on the ideal outcomes. With the ultimate goal being to unlock resources, it is important to set intermediate milestone targets.

Once funding prospects have been identified, we can now look ahead to determining access points and gauging proximity. The warmer we can get an introduction, the more directly it will work in our favor. Can we find a connection through our board members or a current funder? Maybe a peer organization will be willing to make an introduction?

In the absence of a warm introduction, don't get disheartened, simply find ways to be in the rooms these identified funder prospects are occupying. Is there a convening you can attend that will create an opportunity for an in person meeting?

Or, can you reach out for a learning conversation with an influencer or decision maker, to get more in-depth insights on how and what they fund? Do not underestimate the power of 'cold' emails or linkedin messages! When done effectively, built on known alignment and strong messaging, this direct outreach is strategic and intentional and can be effective in securing funder meetings and initially building funder relationships.

In tandem to this, it is also necessary to think about who in your organization will be the 'face of outreach'. Yes, it can be the CEO or Development Director, but based on your research on the funder, it could also be a Program Director or your Research Director. Consider, too, the intricacies of the program you're hoping to get funded. Who is going to be rolling up their sleeves to get the implementation work done? Is this person better placed to do the outreach with the funder than say, the CEO?

Stage 2: Engagement

Having now identified deeply aligned funders and an initial strategy for outreach, we now go into the heart of engaging donors and building authentic relationships. Determining details on how to engage, figuring out outreach tactics, and planning the cadence of outreach are all in focus now. Tactics should ideally leverage existing organizational infrastructure and assets.

It is also important to be in tune with the funder prospect's news and developments. Tactically, this could mean setting up Google alerts for the funding organization and/or key contacts, following them on LinkedIn, and/or signing up for their newsletter, among others. On a deeper level, this is being aware of what matters to them, in real time. What op-eds have they published? What grantees are they spotlighting? In what ways are they contributing to sector thought leadership?

Once initial outreach has happened, the cadence of follow up will be determined by you, what you know about the funder, and what you have to offer in your follow up outreach. We often recommend clients start with a two-week cycle, sending a check in email every couple of weeks, and then adjusting to every 2-3 months.

Each touchpoint should show an honest attempt at connecting with the funder as a human being. This can be done by aligning on similar passion areas or mission focuses, sharing learnings from the broader sector, or complementing their work with your own referrals and connections. It is worth your time to be intentional about each funder outreach when you know you are reaching out to deeply aligned funders who would be strong partners in your work.

At this stage, it is equally important to center on what you have to offer in the relationship. Funders and implementers go hand in hand; neither can exist without the other. You are presenting an opportunity to further their work and mission as a funder, just as much as they provide an opportunity to move your work forward. Own this and approach your outreach with this lens of mutual respect and authentic curiosity around where there may be opportunities to partner together for greater impact.

Stage 3: Maintaining Momentum

This stage occurs in parallel with the actual relationship advancement and outreach to funder prospects. Maintaining momentum is the central theme here. If you had a great first meeting with the funder, but they're being non-responsive when you follow up or inform you of a strategic pivot, it is essential to make decisions. Do you want to adopt a low-effort maintenance outreach, ramp up your outreach, or pivot to other prospects altogether?

There is often no one right answer, but this is informed by considering multiple information points you have collected in the course of your engagement. Additionally, in view of your own organization's funding priorities and time, does it still make sense to pursue the opportunity? Build in moments of reflection for gut checks at this stage. Often a donor response is not their unwillingness to be direct and share a no. They also have competing priorities, an overflowing email inbox, and personal lives to balance with their professional lives. Give space for the timing to align, and ensure that as you maintain momentum, you are doing so in a way that honors both your bandwidth and the funder as a human who is also balancing other priorities in their daily schedule.

Conclusions

Having touched upon the three stages, some key principles that our team has found helpful in the journey of professional persistence are:

- Every interaction with the funder should be mutually beneficial, even if the end goal is securing funds.
- Building authentic relationships is key, to not just attracting funds, but to be a valuable sector player.
- Adopt a lens that prioritizes long-term foresight.
- Consider your own values and opportunity cost. It is not just the funder's time and preferences that matter, yours does too.
- Build a robust deeply aligned prospect pipeline; it improves organizational resilience and boosts your ability to deliver impact.

Our team at Black Fox Global wishes you the greatest success in your fundraising efforts! Both in securing the funds needed for your impactful mission, but also in the growth of your network and the authentic connections you build with funders and peer leaders along the way. We encourage you to utilize the corresponding Professional Persistence worksheet here as you consider how to maximize your current and potential funding opportunities. Onward!

The recording from this Fundraising Masterclass is available on the Catalyst 2030 Youtube channel here, and linked here is the slide deck. Part two of this series, Maximizing Opportunities for Funding, is available here.

FUNDRAISING ROADMAP: ATTRACTING BOLD AND BIG BET FUNDING

Prepared by Natalie Rekstad, Founder | Black Fox Global; and Kimberly Westerfield, Head of Programs | Western Union Foundation (formerly Skoll Foundation)

In early 2020, we had plans to publish an exciting report, Bold & Big Bet Philanthropic Landscape, 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, the would-be blog post was converted to a 75-minute webinar, Fundraising Roadmap | Attracting Bold & Big Bet Funding. Presented by Natalie Rekstad, founder of Black Fox Global & Kimberly Westerfield, now the Head of Programs at Western Union Foundation (and formerly of the Skoll Foundation), 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 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 (coming soon). 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

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
4. Have Strong Leadership

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.

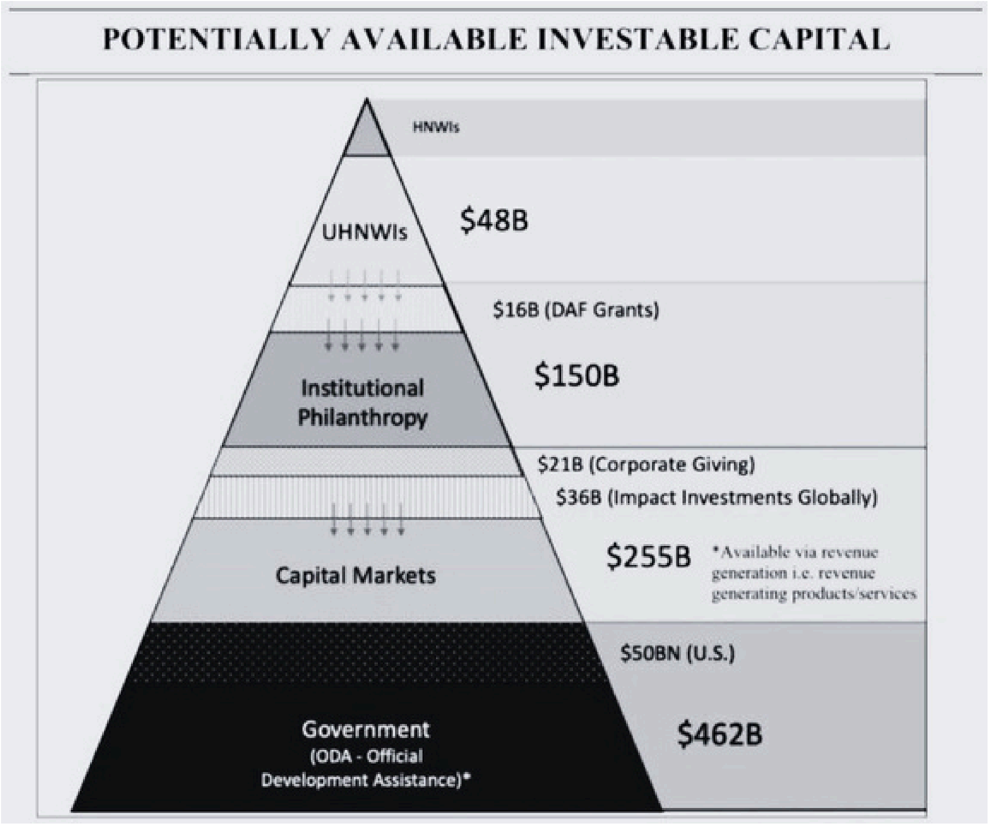
Most philanthropist's north star is "first do no harm," especially in the institutional space, where remaining accountable to the public is how they maintain their legal operating status. How can an institution be accountable to their stakeholders if their grantees are not accountable to them? How do 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.



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!

MAXIMIZING ATTENDANCE AT SECTOR CONVENINGS

Prepared by Natalie Rekstad, Founder and Chief Executive Officer| Black Fox Global with contributions from Lisa Heinert, Chief Operating Officer | Black Fox Global; Jill Ultan and Claire Wathen| Skoll Foundation; Matthew Patten| Catalyst 2030; Topher Wilkins |Opportunity Collaboration

The following post has been updated over the years, building on collaborative webinars and offerings by key conveners in the global social impact space. For more specific tips on some of these convenings, check out these links:

- Maximizing Value at Convening Spaces with Claire Wathen and Matthew Patten
- Maximizing Attendance at Opportunity Collaboration with Topher Wilkins
- Maximizing Attendance at the Virtual Skoll World Forum with Jill Ultan
- 2025 Skoll World Forum Tips Sheet / Unofficial Guide
- 2024 Opportunity Collaboration Tips Sheet
- Visualization exercise to prepare for Skoll World Forum, led by Natalie Rekstad
- Black Fox Global's 2024/2025 Convenings List (not comprehensive; please share additional convenings we should add to the list!)

Attending Sector Convenings: Begin With the End in Mind

Begin With the End in Mind – This beautiful intention was made popular by Steven Covey, to begin with the end in mind. Know your purpose for attending and choose your conferences wisely.

Know Why You're There – Center around your own purpose and the important work you do to build effective partnerships and collaborations toward impact.

Anchor in Intentions – Begin each day with mindfulness or prayer around your intentions to know "where I am needed most today" and expressing gratitude for the privilege to serve this community.

Preparation is Key: Preparing for the Convening

The process of preparing for an event, just like the process of preparing for a role in a play, can improve your craft and ability to connect with others. Bringing your whole self, clarifying your "why", and showing up with the intent to serve can help maximize the relationships you develop.

Connect with People You Know – Plan for the event, review the attendee list and schedule time to reconnect or identify those you would like to meet to maximize your attendance.

Dive Into Your Storyworld – Fall into the story of your organization, get into character to be your authentic self to bring your story to life. What is the story of the person you meet and more importantly what is the story you could write together?

Conduct Thoughtful Outreach – Lead with generosity, master the art of outreach, introduce yourself with purpose and really see the person in front of you. Bring your whole self, a deeper purpose, and seek ways of collaborating to move each other's organization forward.

SWF Ecosystem Opportunities – While we may not be able to attend some of the large convenings due to travel costs, attend the SWF free virtual events (the plenary is a must attend) and in-person ecosystem events hosted by Marmalade. How to prepare for the SWF and delegate list.

Meet in New Spaces – Set up meetings in advance and think outside the box for spaces or meet a power walk that is energizing, fun and memorable if time permits.

Lead with Value in Conversations – Plan for conversations knowing who you are meeting with "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, recognizing you are interested in learning more about their journey.

What Are the Drivers of the Problem You Are Trying to Solve – Know what drives your organization to intentionally work on a particular social problem. What are the drivers of the organization or funder you wish to meet? Where do you align with their work and how can the two organizations collaborate? Knowing the points of commonality will help lead your discussions.

Showtime: At the Event

We have been telling stories to engage others for over 9,000 years and attending events in person or even virtually provides you with a chance to shine. While some of us are natural extroverts and are energized by meeting people, others need to prepare for the intensive two to five-day experience. Bring your whole self, slow down for serendipity, be authentic and step inside your creative zone. Take breaks to recharge.

Slow Down For Serendipity – After the preparation, research and planning, surrender yourself and be fully present to be ready to accept magical encounters. Seeding serendipity takes deliberate planning and flexibility, both.

Be Authentic – Approach time with peers with humility and make it real. It's an open secret that funders know when they're being viewed as a walking dollar sign, and nothing is more off-putting. Funders are human too, be respectful of donors' time and follow up with your "golden nugget" after the event, as one of the participants said – don't be a "stalker". For insights, read the "Leading the Donor Dance" for more insights.

Relax Until Your Brain Stops Spinning – Find a quiet corner or retreat outside with a short breathing exercise to calm your mind and land back fully in your body. Inhale through the nose to a count of 4, hold for 7, and exhale through the nose for 8. Pause and relax until you are able to unlock the door to your creative state.

Step Inside the Creative Zone – Once you're relaxed, all the walls inside start to fall away, you are in a heightened state of awareness, your senses are in tune, and your imagination and creativity are set free. Fears disappear as instinct replaces overthinking.

Active Listening – Active listening, not pitching, is the pathway to deeper engagement for both sides. Be accountable and carve out time to take notes so that you can personalize your follow-up in a meaningful way. See the SSIR article, The Pitch is Dead. Long Live the Conversation.

Be Generous – We all have gifts to share, but too often we fall back to a culture of transactions and prioritizing our own organizational health. See networking paradigm shift by Elizabeth Seagram, give what you want to receive.

Be Memorable – Share your personal WHY, stand out from the crowd, and be clear, concise and compelling, see this tool: "Crafting Your Why".

Systematic Approaches to Funders – Spend the time researching and preparing before to identify if your work aligns with the donor's similar funding priorities. To prepare for the event, Black Fox Global offers open-source resources including this Fundraising Handbook and the Fundraising Masterclass Learning Series Resource.

Be Aware of Positions of Power – Be aware if you hold a position of power, that we are all equals, we all bring our own unique talents to the conversation. If you are a funder or a social innovator, sign the Shifting the Funding Paradigm letter on how we are advocating to shift funding practices.

Protect the Asset – Take care of yourself, take time for a walk, do yoga, attend the parties, meet up for drinks, and create the space to grow, but take time to recharge.
Let the Merit of Your Work Be Your North Star – We are all doing important work, and we all add value to the shared vision for a better world. As Claire Wathem said, "You are enough." We are all contributing in our own unique ways on the front lines and behind the scenes fighting to end poverty and achieve the SDGS by 2030.

After the Show

After the Ecstasy, the Laundry – This Zen saying reminds us to follow up with those we met with, and follow up in a meaningful way. For those seeking to fundraise, move away from the "ask" and towards building authentic relationships.

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.

Concluding Advice

We ended this energizing discussion with last-minute advice for those who are attending upcoming convenings either in person or virtual.

1. Protect your asset. Take care of yourself and your team.
2. Make it personal. Remember everyone's a human being.
3. You are ready and you are enough!

Come into each convening space with a heart full of hope for the future and meet social impact leaders who are making a difference in the world. You will be rewarded with deeper and more meaningful interactions that can translate into moving your work, and humanity, forward.

ROADMAP TO LAUNCHING A POWERFUL AND EFFECTIVE MAJOR GIFTS PROGRAM

Prepared by Natalie Rekstad, Founder and Chief Executive Officer| Black Fox Global

In navigating the complexities of the funding landscape, including restrictive grants that can hinder creativity and innovation, looking to engage individuals as funders can help drive new, reliable, and unrestricted funding to your mission.

That's why in this resource, we'll examine:

1. Why major giving is so important
2. What questions you should be asking within your organization before embarking upon 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

As with our other trainings, webinars, and blog content, we apply a 'plug and play' approach with these resources to make them accessible to everyone, from the novice fundraiser to the most experienced. We hope this resource helps drive new funding to your mission.

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 funders 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 $100,000 for a large international organization. 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
- Clearly articulated vision for how funds will be invested over the arc of a multi-year pledge
- 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:

- What proportion of this is unrestricted funding? (overhead, research & development, scale)
- Will you have goals around securing multi-year pledges?
- 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 the 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 Black Fox Global Major Gifts Prospect Rating Form for your use.

- 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? Note: Some wealth engines offer a seven-day free trial, and you can run your database through the screening within that time frame.

- 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.

- 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 rollout? 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 and conduct meetings, make the ask, and follow up effectively afterward.

- Outline your organization's time investment. We would advise the following:
  - Four to Six-Month Quiet Phase/Advance work: 12 – 16 hours per week
  - 12-Month Public Facing: 8 – 10 hours per week
  - Ongoing: 5 – 8 hours per week unless a field visit year

- Conduct a skill set 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

- 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?

- 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

Here 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 work plan/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.

January/ February	• Engagement materials first draft (benefits, value proposition, compelling narrative). Materials Checklist: 1. One-pager "Case for Support" specific to Major Gifts 2. Pitch Deck as tool for overarching narrative of organization and to make the case for unrestricted funding (optional) 3. Invitation Letter (segmented baked upon funder level) 4. Pledge Form 5. 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 from 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 goals for quiet phase emphasized. • Convey palpable excitement toward public launch with all.

August/early September	• 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.

August/early September	• 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.
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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 relationships, and can lead to conversations about planned/legacy giving.
- 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, crypto, planned giving, etc.)
- First look at research and reports produced by the organization
- Exclusive 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

In this digital era, strong printed collateral isn't necessarily an essential component of an effective program, but if you do produce these assets, 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 that 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.

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

WHAT TO DO IF YOUR ORGANIZATION IS DECLINED FUNDING

Prepared by Natalie Rekstad, Founder and Chief Executive Officer | Black Fox Global

A denial letter or email from a funder can be disheartening, but there is also gold in understanding the "why" behind the denied funding. The most valuable thing you can do if your organization is declined funding is to get feedback and guidance to help increase 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?
- 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, or be explicit that you are asking for 10-15 minutes of their time on a call, and stick to that.

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 Global, 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.

P.S. – Looking for more foundation prospects? Painless Prospecting might be just what you need. Have the right prospects but lack the time or strategy for effective outreach? Advancement Outreach might be a good fit!

8 GAME-CHANGING TIPS FOR ENGAGING NEW FUNDERS

Prepared by Natalie Rekstad, Founder & Chief Executive Officer and Ashley Stokes, Advancement Specialist | Black Fox Global

This content can be downloaded here .

This guideline was created to help our Painless Prospecting clients confidently and knowledgeably initiate contact with new funding prospects; however, we recognize a guideline like this can help other development professionals in the sector. An emphasis here is on making inroads when you have no insider connections; however, the same principles can apply with warmer leads. The guideline 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. A good phone call can make all the difference. If no number but an email address is listed, your email should always include a request to speak further on the telephone.

TIP 2: If you must initiate outreach via email due to explicit instructions, we recommend the following protocol:

- Email with a compelling opener, and stating that materials are 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, including handwritten note.
- Follow up call to collateral, engaging them in a funder-centric way (having done your homework).

- After conversation, send them something of interest that ties into the conversation you had, but not about your org – a thoughtful article about the issue area you both care about or something else. No ask in this communication, just a "thought 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 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 between you 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, having read articles they've published, or the topic of their Ph.D. 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 you have much in common. This person is an influencer in the organization, but aside from that, it is affirming to talk with kindreds 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 convening 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 or to a contact through Linkedin, it is very important that you don't request funding. You are not requesting 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 if there is 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."

If you are reaching out via LinkedIn by direct message or request to connect, language such as this can be helpful:

"I came across your recent LinkedIn post about XYZ Foundation (or X topic) and was struck by the synergy between our work — I was hoping to connect with you as I am also passionate about supporting ABC field and how our organization has a unique approach to 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 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.

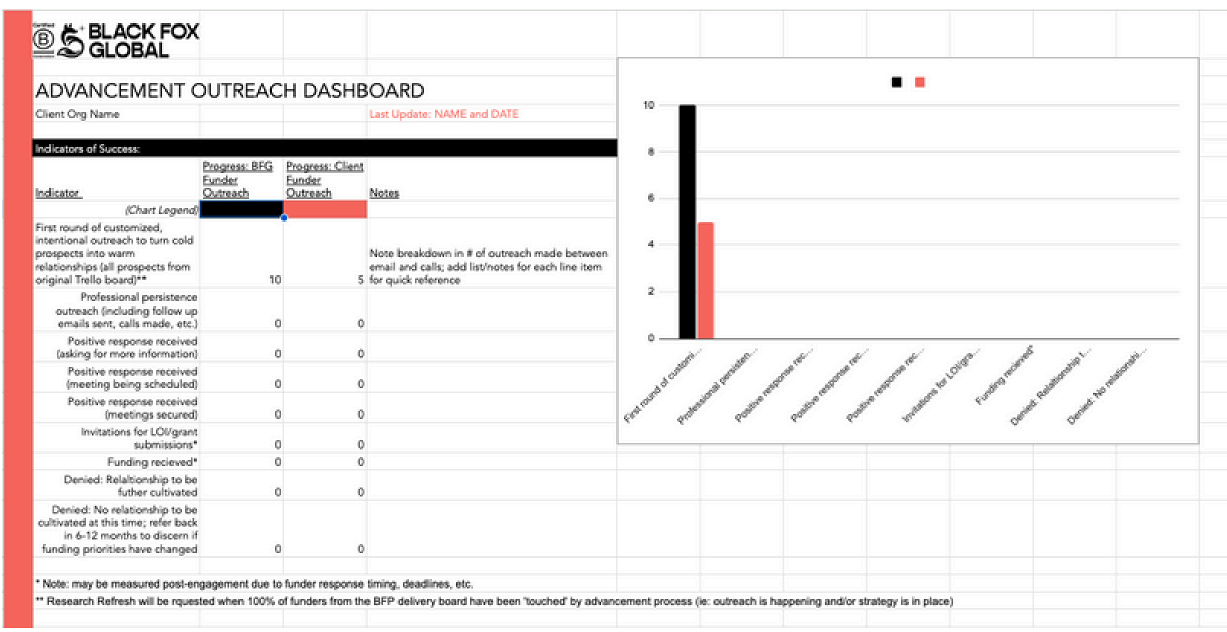
After really hearing them, you can follow up with an exploratory tone: |Would it make sense for me to tell you a bit more about (YOUR ORGANIZATION), to see if there is a synergy between your mission and our work? At the end of that conversation, we can decide together if it makes sense for us to apply for funding."

FUNDRAISING OUTREACH AND ENGAGEMENT AT A GLANCE

Prepared by Ashley Stokes, Advancement Specialist & Lisa Heinert, Chief Operating Officer | Black Fox Global

Effective and efficient fundraising is crucial for nonprofits to achieve their goals in today's highly competitive fundraising landscape. To aid in this process, Black Fox Global uses an Engagement Dashboard to track progress throughout our client engagements. In our latest open-source offering, we explore how this dashboard simplifies the tracking of fundraising efforts, creates accountability and transparency, and provides a consistent, at-a-glance look at funding progress and deliverables.

The dashboard provides the ability to track and monitor key fundraising success indicators easily. While many NGOs use various project management software tools to assist with collaboration and connecting across their organization, the dashboard is a helpful snapshot of the work happening across these teams. At Black Fox Global, we use this tool as our internal and client-facing snapshot for our client engagements.


ADVANCEMENT OUTREACH DASHBOARD

Client Org Name — Last Update: NAME and DATE

Indicators of Success:

Indicator	Progress: BFG Funder Outreach	Progress: Client Funder Outreach	Notes
(Chart Legend)			
First round of customized, intentional outreach to turn cold prospects into warm relationships (all prospects from original Trello board)**	10	5	Note breakdown in # of outreach made between email and calls; add list/notes for each line item for quick reference
Professional persistence outreach (including follow up emails sent, calls made, etc.)	0	0	
Positive response received (asking for more information)	0	0	
Positive response received (meeting being scheduled)	0	0	
Positive response received (meetings secured)	0	0	
Invitations for LOI/grant submissions*	0	0	
Funding recieved*	0	0	
Denied: Relaltionship to be futher cultivated	0	0	
Denied: No relationship to be cultivated at this time; refer back in 6-12 months to discern if funding priorities have changed	0	0	

* Note: may be measured post-engagement due to funder response timing, deadlines, etc.

** Research Refresh will be rquested when 100% of funders from the BFP delivery board have been 'touched' by advancement process (ie: outreach is happening and/or strategy is in place)

Although our fundraising efforts are extensively documented in a collaborative management app, it doesn't offer a convenient overview of our work. The dashboard provides a concise picture of overall advancement outreach, highlighting progress towards important indicators of success.

Our Advancement Outreach service enables organizations to foster meaningful connections with potential funders. By leveraging our techniques, including strategic professional persistence, we demonstrate quantifiable results through our user-friendly Engagement Dashboard. Clients can easily see the number of:

- Funder outreach attempts made (through emails, phone calls, etc.), both from our team and the client
- Funders who responded positively and requested additional information
- Funders who responded positively and requested a meeting
- Secured funder meetings
- Invitations for grant or Letter of Intent (LOI) submissions
- Funding received during (or after) the engagement
- Funders who denied funding at this time and need further cultivation
- Funders who denied funding at this time but may change their priorities in the future, prompting the client to follow up periodically

This snapshot serves as a crucial reference point during regular collaborative sessions with our clients. Together, we analyze the dashboard's insights, enabling us to assess the impact of our outreach and make informed decisions about refining our approach. Through this collaborative process, we ensure that our clients receive the quality service and progress in their relationships with funders to deepen their impact.

This process has helped us serve our clients by:

- Efficient Prospecting: Being efficient is at the core of our work. The dashboard serves as a centralized hub, recording every outreach effort while simultaneously tracking funder responses. By tracking this information, we can assess the effectiveness of outreach efforts and refine techniques and strategies accordingly. We utilize and review this information regularly with clients to gauge progress.

What this means for you: NGOs can use the dashboard to monitor key performance indicators (KPIs) related to their outreach efforts and fundraising targets. By customizing the dashboard, NGOs can determine the efficacy of different communication methods, whether it be through emails or phone calls, and also identify the effectiveness of specific appeals or email templates, LOIs/grants submitted, and dollars raised. Tracking these outcomes enables NGOs to identify successful strategies and adjust tactics if necessary.

- Enhancing Transparency: Transparency is key in fundraising and for Black Fox Global, builds client trust. The Engagement Dashboard ensures transparency by offering accessible and visual tracking of funder outreach efforts, funding progress, and deliverables. By leveraging the power of data, the Dashboard presents information clearly and concisely. With real-time updates, organizations can easily monitor the status of each fundraising effort, enabling them to make informed decisions and stay aligned with the organization's goals. This resource has benefited our clients when they need to show fundraising progress or funding potential to their board members or to funders to demonstrate the professional nature of the fundraising engine.

What this means for you: NGOs can leverage the dashboard to create clear and intuitive representations of their outreach outcomes, fundraising progress and potential. If your organization has board members, other departments, or stakeholders seeking a comprehensive view of your fundraising efforts and return on investment (ROI), this clear display of information can significantly simplify their understanding and engagement with the data. Further, it allows anyone within your organization to align on clear fundraising targets, ensures transparency around progress made on outreach and subsequent results, and creates opportunity for open conversations about what is working, what is not, and what can be done to reach your fundraising targets.

- Timely Delivery Tracking: Accurate and timely delivery is critical to our success, particularly when creating a client's Communications Toolkit or meeting deadlines for grant submissions. The dashboard's ability to show delivery dates enables us to track and manage time-bound activities effectively. With this information readily available, we can ensure timely follow-ups or necessary approvals, reducing the risk of missed opportunities or delays.

What this means for you: For NGOs, the dashboard can serve as a central hub for communication and coordination among team members. During your weekly staff meetings, this is an excellent resource to discuss progress with important communication materials and critical LOI and grant application deadlines, enabling better collaboration and minimizing delays.

- Tracking Grants and Foundations: The dashboard provides an overview of all grant proposals, including their status, key dates, and any important notes. It helps us keep track of proposal stages, such as those in progress, submitted, and funded/not funded. This allows for better organization and monitoring of our engagement progress with clients, and demonstrates the potential financial impacts of the engagement, many of which are likely to be fully realized after our work with the client is complete.

- What this means for you: Our Foundation Tracker tab is an indispensable tool for NGOs looking to monitor their revenue goals effectively. This critical template provides an up-to-date overview of potential partnerships, quantifies the percentage likelihood of securing funding, tracks awarded grants, and calculates the required funding to achieve your target goals. Using the Foundation Tracker, you can strategically advance funders up the percentage scale, maximizing insights on the probability of securing funding. This feature underscores the significant role of building strong relationships in securing financial support. Increased engagement with funders significantly enhances the likelihood of securing the necessary funding for your organization's success.

The Engagement Dashboard is easily customizable for any NGO looking to monitor their outreach efforts and progress toward fundraising targets. This tool significantly improves the capability to have a clear picture of fundraising efforts and outcomes, enabling you to calibrate to even greater success. It streamlines monitoring, supports efficient prospecting, tracks delivery dates, simplifies approval processes, and allows comprehensive documentation and transparency within your organization. By leveraging this tool, NGOs can increase their fundraising success rates and ensure better collaboration within your organization. Access your customizable Engagement Dashboard here by creating a copy and saving it either on your organization’s shared drive, or downloading it as an excel or numbers sheet.

As you continue on your fundraising journey, Black Fox Global sends you well wishes for a remarkable fundraising season. May your dedicated efforts create a profound and positive impact on all you serve, and may the incredible generosity of others surpass your fundraising expectations.

ENGAGING MISSION-ALIGNED FUNDERS IN A VIRTUAL WORLD

Prepared by Black Fox Advancement Team and Ashley Stokes, Advancement Specialist | Black Fox Global

Note: This article was originally published as Part 2 of a Virtual Skoll World Forum Masterclass: Engaging Mission-Aligned Funders | Advancement Outreach Best Practices. The following content has been updated to reflect our ongoing fundraising practices in a virtual world.

Echoing our sentiment from Part 1 of this series, Funder Research | Best Practices in Uncovering Mission-Aligned Funders, Black Fox Global would like to congratulate the entire Skoll Foundation team on hosting such a valuable virtual gathering in 2020. The first of its kind in the convening's history, the 2020 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 Global employs an open-source model, releasing content designed to strengthen the fundraising capacity of organizations in all stages of development to this blog. 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 original session, Engaging Mission-Aligned Funders | Advancement Outreach Best Practices, HERE and view the accompanying slide deck HERE. In this 75-minute session, Black Fox Advancement Specialists 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.

In the world of virtual fundraising, here are three tips on engaging funders when you can't see them face to face.

TIP 1: Grow your online network

Continue to grow your network on LinkedIn. Reach out to foundation leaders, board members, and program officers, including outreach coming directly from your board and leadership team. Post updates regularly, including on key team and leadership LinkedIn pages. Share and link sector news that is relevant to your mission.

TIP 2: Deepen your relationship with funders by staying connected online

Follow funders via X (formerly Twitter), Instagram, and LinkedIn to ensure you are up to date with their latest news, and consider reposting, liking and sharing their news with your social media network. Study what funders say about the field by conducting regular due diligence on prospects and setting Google Alerts so you have the most up to date info on funders. Use this in your professional persistence by sharing authentically how much you enjoyed an article they wrote, or by sharing an article you think would be of interest to them and their field of work.

TIP 3: Create learning opportunities and a sense of community.

Position your organization as an essential contributor to the sector. Think about what your funder is seeking to learn. Some questions to consider:

- What are the broader learning questions in your field/area of service?
- What are the questions that your existing grantmakers need to answer and why?

Host quarterly town halls for funders to hear from staff and the people being served about these topics. Host and co-host virtual events through convenings like the Virtual Skoll World Forum. Invite funders to attend so they can get to know you and the issues you face better.

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FOSTERING AUTHENTIC AND LASTING FUNDER RELATIONSHIPS

Prepared by Natalie Rekstad, Founder & Chief Executive Officer and Ashley Stokes, Advancement Specialist | Black Fox Global

Black Fox Global recently led a Masterclass hosted by our partners, Catalyst Now, focused upon engaging funders in ways that lead to sustained funding for your vital mission. As part of our commitment to being 'Open Source,' this guide distills key takeaways from this masterclass, offering actionable strategies and expert insights to refine your fundraising approach. For a more expanded version of this guide that goes into far more detail, click here.

Whether you're just starting out or seeking to strengthen existing relationships, this guide will help you build authentic connections with funders and create a path toward long-term success.

1. Mindset Mastery: Rooted in Worthiness

The foundation of successful fundraising starts with your mindset. Funders invest not just in programs but in people—leaders who embody confidence, authenticity, and a deep sense of worth in themselves, in their mission, and in their organization.

Reflect on Your Why:

- Why is this work uniquely yours to do?
- Why are you (not just your mission) worthy of investment?
- Why is your organization deserving of being fully funded?

Your identity as a leader who deserves funding is essential. When you meet with donors, non-verbal cues like posture, eye contact, and tone shape first impressions. When you radiate confidence and authenticity, funders will be drawn to your vision.

2. Securing the Funder Meeting: The Art of Connection
Once you've anchored in your worth, the next step is identifying aligned funders and securing a meeting. This requires research, strategic outreach, and resonance with the funder's priorities.

Effective Outreach Strategies:

- Google Alerts & Funders' Newsletters: Stay updated on funders' latest priorities and activities, and send notes of congratulations or other comments that do not involve an 'ask'.
- Leverage LinkedIn: Identify mutual connections and request warm introductions. Comment on funders' posts, and repost with your own views.
- Event Invitations: Invite funders to webinars or sector convenings to spark informal connections.
- Public Speaking: If presenting at an event, personally invite funders, and follow up with key takeaways that you feel would be of particular interest to them.

Example Outreach Message:
"I appreciated your insights on [topic]—especially your point about [key takeaway]. Our organization approaches this through [unique lens]. Given our shared mission, I'd love to explore a potential collaboration. May I send you my Calendly link to schedule a 20-minute Zoom conversation?"

3. Building Rapport & Leading the Donor Dance
Fundraising is a collaborative discovery process. Instead of simply pitching, engage funders in meaningful conversations to explore alignment.

Techniques to Foster Connection:

- Be Curious: Instead of focusing solely on your organization, ask funders about their motivations and priorities. Learn more about their heart, their 'why', and how they arrive at the investments they make. This will help you make an informed ask if there is indeed mission alignment.
- Craft Your "Why": To build trust, share a compelling narrative that highlights your passion and dedication to your shared vision.
- Set an Intention: Before the meeting, visualize a successful outcome, and approach the conversation with confidence and openness.

Meeting Structure:

- Opening: "I can't help but be curious—what inspired you to care so deeply about [mission focus]?"

- Discovery: Ask open-ended questions about their investment priorities and decision-making process.
- Visioning: Help them see the impact of a partnership: “If we were celebrating our shared success three years from now, what would that look like?”
- Decision-Making: Understand key stakeholders involved in their funding decisions, the process they undertake, and the timeline.

Expert Tip: Ensure funders do at least 70% of the talking in the first meeting. The more they share, the better you discern alignment, and tailor your ask in a way that makes it easy for them to say yes.

4. Making the Ask
Frame your ask as an opportunity for the funder to fulfill their mission through your work.

Approach Options:

- Direct Ask: “We’d love to join forces to [mission goal]. We invite you to partner with us through a lead investment of $__.”
- Collaborative Ask: “Based on our conversation, I’d love to invite you to join us, but I’m unsure where to go next in terms of an investment amount. Based upon all we’ve discussed, where do you see yourself?”

Expert Tip: A compelling ask is clear, confident, and aligned with the funder’s vision for impact.

5. Professional Persistence: Following Up with Elegance
Following up is an art. Persistence is not about being pushy—it’s about nurturing relationships over time.

Follow-Up Strategies:

- Immediate Gratitude: Send a thank-you email or voice memo within 24 hours.
- Personalized Follow-Up: Reference specific discussion points and share relevant insights or resources.
- Regular Check-Ins: Maintain a steady cadence of follow-ups via email, phone, or LinkedIn, with a steady rotation of ‘sector citizenship’ that does not involve an ask, but instead shows you understand their heart, their priorities, and their vision. This can be in the form of sharing resources and/or an article of interest.
- Handling a “No”: A “No” today doesn’t mean a “No” forever. Ask for feedback and keep the door open for future opportunities. Refer to the Black Fox Global guide: What to Do if You are Denied Funding.

6. Guided Visualization: Manifesting Abundance

A strong fundraising strategy is reinforced by a mindset of abundance. At the end of our Masterclass, we guided participants through a visualization exercise specifically designed to attract funding partners. Listen to a version of the recording here.
Visualization Techniques:

- Morning Practice: Engage in visualization before fundraising meetings or events.
- Abundance Mindset: Imagine funders feeling deep alignment with your work, and thrilled to invest in your mission.
- Gratitude Pairing: Express gratitude for existing support to create space for more resources to flow in.

Expert Tip: Pair visualization with affirmations like, "The right funders are eager to invest in our work, and our mission is fully resourced."

Final Thoughts: The Power of Authentic Relationships

Engaging funders for sustained success is a journey, not a sprint. Approach fundraising with authenticity, strategic outreach, and professional persistence. The key is to successful fundraising outcomes is building meaningful, long-term relationships that align funders' visions with your mission.

For a deeper dive on this topic, we invite you to watch the full Masterclass replay and explore our guided visualization on abundance mindset.

FUNDRAISING SELF-IDENTIFICATION AND ENGAGING YOUR NETWORKS

Prepared by Natalie Rekstad, Founder & Chief Executive Officer | Black Fox Global

We are all impacted by the changing landscape in the impact sector, and your role in shaping a more just and inclusive world is crucial, and further, you are uniquely qualified to meet this moment with Grace Under Pressure. We're here to help.

This Masterclass led by Natalie Rekstad, Founder & CEO of Black Fox Global, and hosted by Catalyst Now, focuses upon meeting the moment in the global social sector by leveraging one's "native genius" in fundraising. It is the second in a five-part series, the first session entitled 'Fostering Authentic & Lasting Funder Relationships' can be found here; skip straight to the video recording here.

By leveraging this framework, you will identify your unique strengths—whether as an Asker, Connector, or Nurturer—to optimize your effectiveness. Further, the session provides practical guidance and tools to support your board members in mobilizing their networks to bring in new funding.

The Masterclass also emphasizes the importance of clear, consistent messaging and crafting a compelling personal "Why" to help build deep and lasting relationships with funders, and provides resources on these topics to support you in their fundraising success.

You can access the recording here.

Meeting the Moment

Maya Angelou once said "Hope and fear cannot occupy the same space. Invite one to stay." At Black Fox Global, we choose Hope. And while we as a sector navigate the abrupt disruption of USAID funding and the churn of executive actions in the USA, the pressing question is: With the stakes so very high, how do we effectively prepare, respond, and persevere in these extraordinary times?

We are sharing our guidance to meet the moment here, as it ties into much of the more expanded content we are providing in this post.

Fundraising Self-ID: Discovering Your Native Genius

Everyone has a natural fundraising style that plays to their strengths. Identify your dominant type from the three categories below, recognizing that you may embody elements of all three.

1. Asker – Making the Ask

- Strength: Directly requesting support, particularly from high-net-worth individuals.
- Personality Traits: Self-assured, resourceful, and decisive.
- Example Ask: “If I were to ask you to make a transformational gift of $X, what would you need to know to say yes?”

2. Connector – Opening the Door

- Strength: Introducing potential supporters and hosting engagement events.
- Personality Traits: Optimistic, versatile, and agile-minded.
- Example Ask: “Can I connect you with our Founder to explore if our mission resonates with you?”

3. Nurturer – Stewardship

- Strength: Building long-term relationships with existing supporters.
- Personality Traits: Empathetic, encouraging, and altruistic.
- Example Ask: “What would it need to look like for you to join me in bringing about our mission within our lifetimes?”

Download the Self-ID PDF to determine your dominant fundraising style, and fuller guidance including language for use in funder meetings can be found here.

Engaging Networks: Leveraging Your Strengths

Your fundraising style influences how you approach networking and relationship-building. Use the following openers and asks that align with your native genius:
- Askers: “The stakes have never been higher for humanity. I’d love to explore how you can join us in creating solutions.”
- Connectors: “I sincerely think that being part of our Impact Circle could be a transformative journey for you.”
- Nurturers: “I’d love to share some impact stories that have deeply moved me. May I tell you more?”

The following language that maps to current events is not in the expanded guide, so sharing example language here that meets the moment:

"As we navigate the abrupt disruption of USAID funding and the churn of executive actions in the USA, the stakes have never been higher for humanity and the planet. For leaders around the world, it is a sacred call to fierce and focused action. It is also an opportunity to invite leaders like you to join in."

"My core belief is that the future hinges upon a just and inclusive world. With the rollback of women's rights occurring on our watch, I'm doing what I can to not only stem the tide of harm to women and girls, but make strides toward a truly gender-equal world. I'd love to talk with you about what that can look like."

Remember, the goal is to guide conversations with curiosity and authenticity, ensuring that potential supporters do most of the talking. This leads to informed asks based on a genuine understanding of their motivations. Expanded choreography for new funder candidates can be found here, and this guide will assist in deepening existing funder relationships.

Grace Under Pressure

Fundraising can be challenging, and while the Self-ID helps you be effective within your 'zone of genius', stepping outside your comfort zone is often required. Trust that your knowledge and skills will expand as you grow to meet the moment. Keep the following principles in mind:

- Focus upon the Mission: Shift your perspective from personal discomfort to what the mission needs.
- Lead with Curiosity and Authenticity: Genuine passion and sincerity are key to building lasting relationships.
- Embrace Growth, Purpose, and an Abundance Mindset: Recognize that growth comes from stretching beyond your comfort zone. Consider framing your work as a "soul assignment" and understand that your lived experience thus far has prepared you to lead in more expansive ways now.

We wish to end on a note of Gratitude. We are all fortunate to be part of the solutions, with hard won lived experience that has been preparing us for times like these. We are deeply grateful to be on this journey with others like you who've chosen to show up in these challenging times with a growth and abundance mindset. It's an honor to serve alongside you on the Transition Team to a world that centers Dignity for All.

GENERAL FUNDRAISING

FUNDRAISING 101

Prepared by Rosie Urbanovich, Communications Specialist | Black Fox Global

Black Fox Global's Communications Department Lead recently conducted a fundraising overview training session for the dedicated and enthusiastic team at Catalyst 2030. Acknowledging that it can be challenging to find succinct and accessible 'Fundraising 101' content, and driven by our commitment to being open-source, we adapted the training session into this brief resource.

We hope you find this resource helpful if you're just starting out in fundraising, want to demystify the jargon, and get your feet under you more quickly so you can achieve the win-win funding your mission deserves.

What is fundraising?

Fundraising in a nonprofit* setting means acquiring 'voluntary income' for your organization. This is money given freely – so a grant, donation, or event sponsorship, for example. Some nonprofit organizations also rely on raising income from other sources to sustain their operations in the form of exchanging goods or services – this could be from government contracts, service fees, or retail income.

Nonprofits can also receive 'gifts in kind.' These are gifts in the form of goods and services, such as IT equipment.

*For the sake of consistency, we use the term 'nonprofit' throughout this article; our intent is that to the best that it can, this represents all forms of nonprofit, NGO, iNGO, charitable organization, not-for-profit, social impact organization, etc. that may be used in various contexts and legal structures. Specific legal implications, systems, and compliance will vary based on your exact location and registered business structure.

How can we use voluntary income?

When money is given freely, there's no exchange of services or goods, so that means there could be some strings attached. 'Restricted funding' refers to when you request grant funding for a specific project, and are obligated to then spend it on that project. There's usually an application or proposal and a budget submitted, as well as progress reporting involved throughout the duration of the grant. Unrestricted funding means you can use that money however your nonprofit sees fit to further your mission.

Many individual contributions – such as public donations – are unrestricted. Having a large pool of individual donors can therefore be quite desirable for many nonprofit organizations, since there will be less administration and reporting involved.

What are the different types of fundraising revenue streams?

There isn't one exhaustive list of the exact ways nonprofits receive money, but we have broken down core revenue streams into three areas. Other revenue streams may include program-related investments (PRI), earned revenue, impact investing, and more. For simplicity, we are focusing on three primary streams that are relevant to most nonprofits.

Government Funding

Sometimes called 'statutory funding' or, depending on the exact source and recipient, 'bilateral' or 'multilateral' funding, these funds come from the government and typically support aid and development organizations. They can be administered via an intermediary, or directly from a government office, such as the U.S. Department of State.

Individual giving or public fundraising

This is any type of funding given by the general public, such as an individual donating $50 to a relief appeal, or a family member sponsoring a marathon with a $100 donation. There are many ways nonprofits can receive money from the public: through email and social media marketing, crowd funders, events, or regular giving programs. Managing a significant database of individual funders and investing in marketing, however, can require a lot of capacity, resources, and even brand recognition. This type of fundraising can take time to build up – and is not always accessible or fruitful for organizations needing funding to sustain their long-term operations. That's where philanthropy comes in.

Philanthropy

Last but not least, we have philanthropic funding. This can be administered through trusts and foundations, or high net worth individuals looking to invest in organizations whose missions align with their philanthropic goals. Whether it's with an individual or a foundation, this type of fundraising requires relationship building and strong synergy between objectives and values.

There are many types of foundations: private foundations, such as family foundations or longstanding trusts, corporate foundations, or 'collaborative funds,' to name a few.

As mentioned above, funds from philanthropic foundations are usually given in the form of a grant, which likely will have stringent requirements on reporting, prerequisites, and what the money is spent on. Between prospecting, persistent outreach, pitch meetings, applications, negotiating, grant agreements, and adhering to reporting requirements – depending on the foundation, there can be a lot of administration involved in receiving grants. However, there is a growing movement away from funding that is short term and restricted, and towards long-term, trust based philanthropy.

How do I engage foundations?

Some grant makers have 'open calls' where any aligned organization that meets the requirements can apply. Some foundations are invitation only, or seek to build a rapport with you over time before inviting you to submit a proposal.
Many proposals employ a multi-step process: starting with a Letter of Intent (LOI), then a full application before moving onto the final stages of due diligence, contracting, and granting. You can read more about BFG's advancement process here.

What should I look out for when seeking a good fit funder?

Before investing time in outreach and proposals, it's vital to engage in prospect research to feel confident that the funder's goals align closely with yours. Things you can look for when researching a funder include:

- Themes, programmatic priorities & Sustainable Development Goal (SDG) alignment
- Geographies and regions: do they give grants in the regions you operate?
- Grant sizes and amounts: does it make sense for your budget? Could you absorb the funds if you were successful?
- Application process and reporting requirements: do you have the capacity to adhere to ongoing reporting and due diligence?

Lastly, you also want to ensure your messaging is 'funder-centric'. Ask yourself:

- Have you done your homework and due diligence to tie the funder's mission/vision to your work?
- Have you thought about how you effectively communicate your impact? It is critical to communicate in a way that will land with the funder. Outreach needs to clearly demonstrate that you have in fact done your homework, and there is clear alignment between their mission and your work.
- How are you monitoring and evaluating your work?

- Can you summarize your identity, work, and approach in a coherent engagement pitch?
- These are some of the basic building blocks to be mindful of when embarking on developing your own successful organizational fundraising strategy.

SHIFTING POLITICS ON THE GLOBAL STAGE: WHAT DOES THIS MEAN FOR FUNDRAISING?

Prepared by Rosie Urbanovich, Communications Specialist and Ashley Stokes, Advancement Specialist| Black Fox Global

As the Associated Press reported early in 2024, there are over 50 influential elections this year, impacting nearly half of the global population. The outcome of these elections have the potential to bring about significant changes worldwide, particularly around human rights, economic stability, climate change, and international development.

With campaign funds raised in the United States alone exceeding $500M USD, many nonprofit leaders are thinking about how redirection of funds could impact their fundraising. Globally, nonprofits and NGOs should be aware of the potential impacts of recent and upcoming elections and adapt their strategies accordingly, equipping themselves to navigate through periods of political change and uncertainty.

Funding Uncertainty in the United States

The United States is experiencing unprecedented surprises this election season, including Joe Biden's decision not to seek re-election and the potential for the first African-American woman and Asian American president. As we enter a charged atmosphere of campaign ads and divisive rhetoric, the political landscape promises to be continuously tumultuous.

The potential election of an extreme right-wing candidate could have far-reaching implications, likely altering the landscape for philanthropic initiatives focused upon human rights, racial and social justice, and democratic governance. This is particularly true in Latin America, where many countries already have strengthened right-wing parties. This political shift will influence U.S. foreign policy and international aid, affecting funding flows to the region.

Some funders are delaying decisions about their contributions until after the election, preferring to assess the political landscape and potential policy changes before committing to their philanthropic priorities. This cautious approach reflects their desire to align their giving strategies with anticipated post-election developments. For example, with women's healthcare and reproductive rights on the ballot this November, many donor organizations that grant internationally could potentially shift their funding domestically. This would certainly be a vital pivot, but one that would lead to significant repercussions for global NGOs that rely upon American funders. We talk more about this dilemma in a blog post after the 2016 election, when funding poured into local and national organizations.

Donor fatigue is also a possibility, as many donors are likely being inundated with texts, emails and social media ads from not only political organizations, but domestic organizations they have supported in response to the election. In addition to elections, global challenges including conflict, war and inflation could all compound this fatigue and potentially make many philanthropists want to evaluate their giving.

Political Shifts Across the Globe

The uncertainty of the changing political landscape is being felt worldwide. Netherlands-based Black Fox Global expert says that the recent election results in the European Union have shifted to more right-wing policies. She adds: "European foundations have responded by restricting funding towards initiatives and projects they consider progressive, such as social, economic, racial justice, gender equality, human rights, and some are also taking a more conservative approach. It's been concerning to see this shift, but we know there are progressive donors who aim to combat this, too."

However, in the United Kingdom, there's been a shift towards a center-left government. UK-based Black Fox Global expert weighs in: "30% of all children in the UK live in poverty. Only time will tell the impact a shift to the left will have on charities and nonprofits, but there's hope that as the new government begins to tackle child poverty, charities can focus on addressing long-term, systemic change." The new Labour government will also be tasked with rebuilding the UK's approach to international development and aid spending, which could mean millions more in available funding for international NGOs.

National elections were held in India this past spring. India-based Black Fox Global expert says: "Over the last few years, the civil society space in India has shrunk, and the The Foreign Contribution Regulation Act (FCRA) was used as a weapon to silence entities whose work was not to the government's liking. The recent election results, which have brought back some balance to India's parliament and forced the ruling party to form the government through a coalition, is a win for civil society and independent, nonprofit media that refused to buckle down to the state's demands and continued to speak truth to power. It shows how indispensable people-led movements are if we still want a functioning democracy. In terms of how things will pan out in the future for India's NGOs, it's too soon to say, but one hopes that the air of invincibility which once clouded the ruling party has diminished, and that the coalition means that there will be fewer attempts to demonize and vilify the nonprofit sector." Many charities aren't currently able to function in India, and for the time being, both domestic and global nonprofits operating in India will continue to be affected.

The current political landscape in Latin America is very diverse and complex, substantially influencing philanthropy and fundraising efforts across the region. Brazil-based Black Fox Global expert shares: "The election of Claudia Sheinbaum as Mexico's first female president marks a historic moment that could catalyze philanthropic initiatives. Following six years of Andrés Manuel López Obrador's government, her administration is expected to focus on social equality, environmental stability, and combating cartel violence, which will likely attract funding and support for related causes. In contrast, Venezuela's escalating political tensions could lead to regional destabilization, prompting increased philanthropic efforts toward refugees, democratic governance, and crisis management. Brazil's municipal elections will also play a critical role in shaping local philanthropic priorities, acting as a thermometer for the 2026 presidential run. All eyes will be on the UN Climate Change Conference, COP30, in Brazil. This will be a major push for environmental investments in the region, particularly in the Amazon, and efforts to end hunger."

In Africa, we will see elections this autumn in Algeria, Mozambique, Tunisia, Botswana, Somaliland, Mauritius, Namibia, Ghana, South Sudan, Guinea Bissau and Guinea. Similar to many other regions around the world, this year will be an indicator of where democracy is headed on the continent of Africa. Kenya-based Black Fox Global expert shares: "In terms of direct impact on funding, in the lead up to elections we typically see greater investments in civil society organizations operating in the democracy space, with a focus on citizen engagement. Beyond this, and in terms of upcoming elections influencing funding flows into Africa, it will largely be determined by who is elected into power. For the philanthropic sector, the trends are less easy to define as they are so diverse in terms of mandate and size. We can assume that funders will be more likely to channel funds into countries with limited risk factors in terms of economic stability, prevalence of fraud, mismanagement of their resources, and corruption."

Focusing on the Future

As Black Fox Global's CEO Natalie Rekstad says, "Politics is just one lever for change. Philanthropy is another." The Black Fox Global team resolutely believes a better world is possible through the transformative work of our clients, nonprofits, NGOs, and other social impact organizations across the world. Here are three ways nonprofits can safeguard themselves from donor instability during uncertain periods:

1. Optimize your Case for Support: Organizations should be sharply focused on connecting with their current and prospective funders and emphasizing why their work is more important than ever. Unpacking why your work is uniquely yours to do, how you can most effectively communicate your impact, and establishing your credibility are all vital building blocks to effective communications. Black Fox Global's message development principles can support you in this process.

2. Focus Upon Cultivating Authentic Donor Relationships with those Closest to your Cause: Research has shown that some cohorts of funders who feel strongly connected to your cause are still very likely to give in the midst of election season. Whether or not their gift is up for renewal, don't hesitate to reach out now. Begin engaging more deeply with your closest funders sooner rather than later; perhaps through an intimate dinner with a close group of donors, or a drinks reception with funders and peers. The more stable and connected you feel with your supporters, the more optimistic and prepared you'll feel whatever the election result.

3. Embody 'Professional Persistence': Developing a structured outreach strategy for your organization is crucial, especially if your current funding is uncertain or unstable. Start by researching each organization thoroughly and showing deep alignment with their goals. Establish a cadence for your outreach, understanding the funder's preferred method of contact – whether through email or phone calls. Additionally, look into your own network to find connections that could facilitate introductions. It is not uncommon to receive no response from a funder on the first outreach attempt. So, maintaining polite and professional persistence with your outreach will be important to keep you top of mind for the funder and distinguish your organization from others.

BUILDING A FUNDRAISING BOARD: RECRUITING AND ONBOARDING NEW MEMBERS

Prepared by Natalie Rekstad, Founder & Chief Executive Officer and Ashley Stokes, Advancement Specialist | Black Fox Global

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. The Executive Director 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" 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 (get), or ideally both giving and getting for maximum contribution.

Do this by establishing a board giving 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 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 Global has developed the Board Self-ID Exercise 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 next 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. Callings call for us 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."

Dr. Lydia Hughes-Evans discusses how to create a culture of high performing boards, and identifies common pitfalls to avoid. She shares, “Creating a high-performing nonprofit board requires intentional effort, effective governance practices, and a commitment to continuous improvement. By defining clear roles, recruiting a diverse board, fostering communication and collaboration, providing ongoing education, and establishing performance evaluations, organizations can build a board that drives strategic decision-making and advances the organization's mission.”

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 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 board members to be engaged in fundraising that isn’t asking for money. They include developing a culture of philanthropy; teaching board members how to be ambassadors of your organization; making the work easy for them by suggesting they host non-ask events,; meeting with board members individually to ask them for their help; and supporting your board members' work by being responsive to their needs and recognizing their success.

You can also help board members 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.

Other factors to consider in building a healthy board is 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 wealth of resources including "Ten Basic Responsibilities of Nonprofit Boards", and the necessity of board members to personally contribute 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 & Chief Executive Officer | Black Fox Global

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, branded as Black Fox Global

Further, Black Fox Global 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 yourself with "Leading the Donor Dance" to ensure the 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 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 committees 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 the 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.

PULLING BACK THE VEIL: TOP 5 THINGS GRANTEES AND FUNDERS WISH THE OTHER KNEW

Prepared by Natalie Rekstad, Founder & Chief Executive Officer | Black Fox Global; and Michele Dilworth, former Senior Director of Partnerships | Candid

Black Fox Global and Candid co-hosted a gathering for capacity building partners and NGOs at Opportunity Collaboration in October 2019. 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 Global commentary. Here's what we learned:

FUNDER PERSPECTIVE

What I Wish NGO Grantees or Potential Grantees Knew

- 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.

- 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 most everything else 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.

- “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 but 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!

- 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.

- 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

- 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.

- 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!

- 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.

- 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, and see what works!

- 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
- Michele Dilworth

In the meantime:

Remember Your Value!

NGOs to Funders: "Your support is absolutely necessary to do this life-changing work. Funders make up 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 on this topic, 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 GLOBAL LENS ON HOSTING A SUCCESSFUL JEFFERSONIAN DINNER

Prepared by Natalie Rekstad, Founder & Chief Executive Officer| Black Fox Global

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 Global 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, there is no reason to not 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 at the end of this post. 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 on 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 their "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; 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 example 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 the 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 judgment 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 ties in 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 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

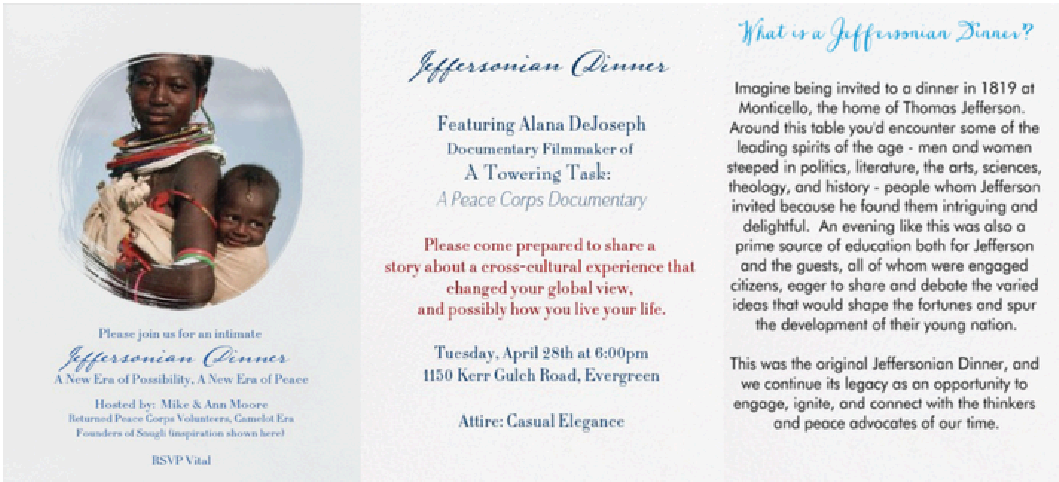
a) If a participant brings up something personal that makes the table uncomfortable in any way – simply say "That is courageous of you to share that – thank you." And move on to a question that could tie in in some way. Question 4 may fit well here bridging the vulnerability into a new conversation.

b) If a participant starts crying, Moderator to 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?"

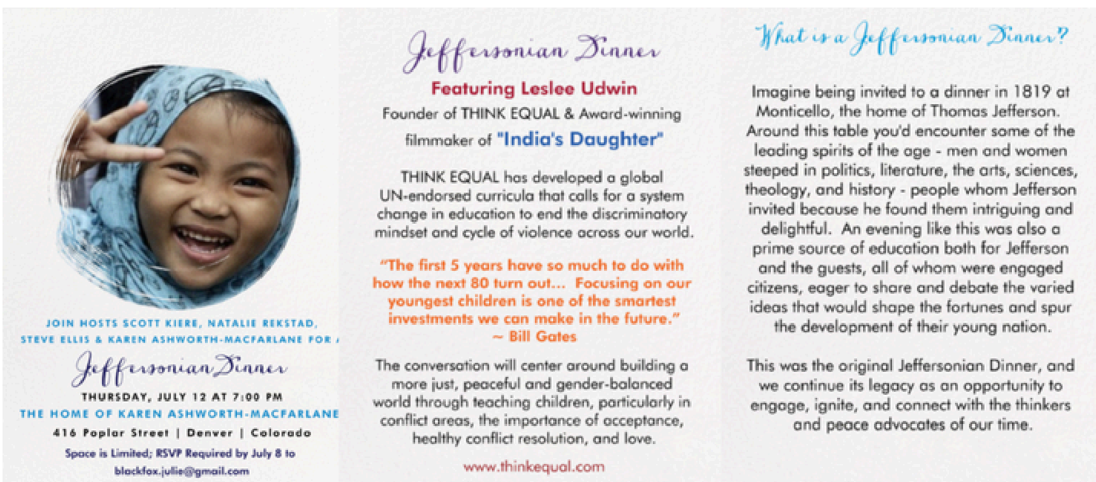
Add-On Questions to Keep the Conversation Going

Tell me more…
That's fascinating; how did you arrive at that…
That's interesting; what inspired you to…

Examples of Jeffersonian Dinner Invitations:



.



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

UNLOCKING THE POWER OF FISCAL SPONSORSHIP: Q&A WITH PANOROMA GLOBAL

By Riley Glandon-Shetty, Director- Scalable Solutions | Panoroma Global; Natalie Rekstad, Founder & Chief Executive Officer and Lisa Heinert, Chief Operating Officer | Black Fox Global

At Black Fox Global, we often have clients and prospective clients from global NGOs who approach us with questions on the most strategic ways to secure funding from US-based foundations and funders. Establishing 501(c)3 status is often the first thought that comes to mind, but there are other options to consider, including fiscal sponsorship. And while our team's expertise in fundraising provides some peripheral knowledge on this topic, fiscal sponsorship is outside our core service offerings at Black Fox Global. Thus, in order to share best practices and tips for this approach to diversifying funding sources and securing additional support services for global NGOs, we got together with our partners and friends at Panorama Global to dive into this topic. We are thrilled to be sharing our conversation with Panorama Global's Riley Glandon-Shetty, and hope it provides valuable insights as you consider the best ways to move your mission forward.

Black Fox Global: We are witnessing incredible experimentation and innovation happening in the social change space, and therefore nonprofit and philanthropic organizations need to continuously adapt and reimagine models of collaboration in ways that enable systems change to happen. What is fiscal sponsorship and how can fiscal sponsors provide a support structure for social entrepreneurs to scale their impact as systems change drivers and networkers?

Panorama Global: Well first, I want to thank you for connecting with me and making this space for talking about the really quite exciting opportunities that fiscal sponsorship can offer. I might be biased in saying this, but fiscal sponsorship can be a game-changer for leaders and organizations who are interested in experimenting with new ideas or who need to navigate constantly changing landscapes. I've seen this first-hand in my role at Panorama Global, where we've been privileged to work with dozens of leaders looking to try something new over the past few years.

As defined very dryly by the IRS in the U.S., fiscal sponsorship is the practice of 501(c)3 nonprofit organizations extending their legal and tax-exempt status to a person or group of individuals engaged in charitable activities related to its mission.

For instance, at Panorama, we improve the operational capacity of sponsored initiatives by providing shared infrastructure so initiatives can tap into our existing accounting, grants management, human resources, administrative, and other services.

As a nonprofit that does social change work in our own right, in addition to fiscally sponsoring a number of initiatives, we see fiscal sponsorship as an incredible tool that can help social entrepreneurs minimize administrative work and focus on their mission. Fiscal sponsors take the burden of accounting and much more off of the shoulders of impact leaders so they can put more energy into the mission they are passionate about!

BFG: As an early-stage social entrepreneur contemplating how best to structure an initiative and whether fiscal sponsorship is a good option, what should folks be considering?

PG: It's important to confirm that priorities are aligned with what a fiscal sponsor's operations and approach can offer. As the leader of an initiative, you will typically lead programmatic activities, fundraising, and donor relationship management, while leaving other operational processes to the sponsor. By plugging into an existing U.S.-based 501(c)3 nonprofit's operational infrastructure leaders can spend more of their limited time focused on programming and fundraising.

Leaders might also want to consider fiscal sponsorship if they know the funding is out there for their work – whether or not they've applied for 501(c)3 status. It can be a great short-term option if organizations have applied and would like to receive grant funding while waiting for an IRS determination. Or, if an organization hasn't applied for 501(c)3 status and are still on the fence, they can work with a fiscal sponsor to receive funding while they discern if a 501(c)3 is ultimately right for them.

Here are a few other questions leaders should consider as they think about fiscal sponsorship:

- Will planned activities for funding be considered "charitable" in the eyes of the IRS? A fiscal sponsor will need to ensure that any 501(c)3 funding is spent in compliance with IRS regulations. If you plan to engage in both charitable and for-profit work, there may be a fiscal sponsorship option as long as an independent entity is established to manage the non-charitable work.
- Has the organization conducted a cost-benefit analysis of starting up an independent entity versus tapping into an existing platform for a nominal fee? Candid put together some great resources that can help you decide if starting a nonprofit is right for you.

- We also recommend exploring whether it's critical that the organization have its own tax-exempt status from the start. To help answer this, leaders should ask themselves if it is important to retain full control over funds raised, as the sponsoring organization exercises fiduciary responsibility over any funding it receives on behalf of sponsored initiatives. Sponsored initiatives will still lead on and retain control over their programmatic work while the sponsor ensures that the program activities are 501(c)3 compliant.

This isn't one-size-fits-all; fiscal sponsors vary in terms of their issue areas of focus, the services they provide, and how they partner with sponsored initiatives. There is an entire ecosystem of fiscal sponsors and intermediaries out there who can unlock access to philanthropic funding more quickly than you would think.

BFG: What are some of the benefits of working with a fiscal sponsor?

PG: Where to begin… Have I mentioned yet that you don't have to hire an accountant or worry about reviewing contracts for compliance?! But in all seriousness, fiscal sponsorship can make the nonprofit sector more accessible and equitable in several ways. It can help you scale your work more quickly by navigating compliance burdens and alleviating start-up costs, as a fiscal sponsor will wade through the legal, financial, technical, and administrative weeds. This is an excellent option for initiatives that haven't yet or do not plan to file for 501(c)3 status as fiscal sponsorship doesn't have to be just a short-term solution but can be long-lasting. Similarly, established initiatives that wish to reduce overhead costs are often fiscally sponsored.

Starting, running, and maintaining a nonprofit requires many steps, and it can take new initiatives several months to be approved by the IRS for 501(c)3 status.

Another benefit is that some fiscal sponsors already have relationships with donor organizations or can easily provide the required organizational due diligence and compliance information needed to receive funding. At Panorama we know that connections are an important part of effective social change work, and that this can unfortunately put up a barrier for some early-stage innovators. One of my favorite parts of fiscal sponsorship work is making connections and introductions across our broad ecosystem of partners! We believe in lowering barriers to entry with donors and improving the equity of access to funds.

Lastly, I want to highlight that fiscally sponsored initiatives are well-suited to serving as neutral platforms for coalitions and networks of nonprofits and donors seeking a place to house their work and funds. Fiscal sponsors are a great option for this!

BFG: What does the fiscal sponsorship relationship look like and how can social impact leaders expect to partner with their fiscal sponsor to achieve their work?

PG: Each fiscal sponsor is unique in how they provide support, and this is a great question to ask potential fiscal sponsors in exploratory conversations. It's important to ensure values and mission alignment, as the fiscal sponsorship relationship should be a very close one, as with any strong working partnership. For example, since all money in and money out is run through the fiscal sponsor, they will need to be in touch with critical stakeholders like donors, vendors, and fiscally sponsored employees. As I said, it can be a close partnership!

That said, I can only really speak to what these relationships look like at Panorama. Each of Panorama's fiscally sponsored initiatives have a dedicated relationship manager – a single point of contact committed to answering questions and finding solutions. Our relationship managers are also great thought partners, helping tailor our support to meet initiatives' unique needs while also ensuring critical risk assessment, management, and compliance procedures are in place so they can continue raising funds.

BFG: What are the key differences between fiscal sponsorship models and how would someone know which model is right for their initiative?

PG: There are several models of fiscal sponsorship, but the two most common types are Model A (Comprehensive) and Model C (Pre-Approved Grant Relationship). You can read more about these models on our website, but at a high level:

- Model A sponsorship is comprehensive, meaning the initiative does not have legal status on its own and relies on the fiscal sponsor's status. In this scenario the fiscal sponsor provides shared infrastructure for sponsored initiatives, takes on responsibility for the sponsored initiative's assets and liabilities, and handles back office administrative work like financials, grants, and HR management.
- Model C sponsorship is where the sponsor is a steward of funds and regrants them to an existing entity without 501(c)3 status (e.g., a 501(c)4 or international NGO) for charitable work aligned with the sponsor's mission. For example, if your organization has charitable status in another country, you can work with a U.S.-based fiscal sponsor to tap into U.S. fundraising that might otherwise be inaccessible.

Each model of fiscal sponsorship can be adapted – or used in combination – to achieve the mutual goals of the fiscal sponsor and sponsored initiative.

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Each model of fiscal sponsorship can be adapted – or used in combination – to achieve the mutual goals of the fiscal sponsor and sponsored initiative.

BFG: Under what circumstances does forging ahead with a 501c3 first make the most sense?

PG: Great question! Strong candidates for obtaining 501(c)3 status include social impact leaders who have the funding and capacity to operationalize their work and a strong desire to operate autonomously. If the leader feels they can confidently and sustainably manage the process and cost of filing the required paperwork, managing staff and payroll, overseeing finances, and executing contracts and grants, while also ensuring funds are spent compliantly, then becoming a 501(c)3 could certainly be a good path.

It's also fairly common for new initiatives to be incubated at a fiscal sponsor while its leaders are busy raising funds and building capacity in order to eventually spin out into an independent 501(c)3. This can be a great way to use fiscal sponsorship as a steppingstone or way to pressure test ideas more quickly.

BFG: You've been generous with these insights; thank you! We'd love to give you a chance to toot your own horn if you're open to it. How is fiscal sponsorship at Panorama unique?

PG: I'm really proud of the ways we've approached fiscal sponsorship at Panorama Global, so thank you for asking! As I mentioned earlier, fiscal sponsorship is just one facet of Panorama's overall social impact work, but the idea of empowering changemakers through deep collaboration is central to everything we do. There's overlap with the work my colleagues are doing to build peer learning communities for recipients of windfall grants, for example, or with another pilot program that is providing 1-on-1 strategic counsel for early-stage leaders. Many of our partners, regardless of where their work starts on our platform for social change, end up connecting in different ways with others in our network. When you work with Panorama, you're really engaging the full breadth of our global network!

Most importantly, we have an amazing group of relationship managers that work day-to-day with our fiscally sponsored initiatives and a stellar Finance and Operations team that contribute to an operational excellence that is critical as a fiscal sponsor. This enables us to offer a range of services in addition to the standard financial, grants, and HR management, including access to international employment arrangements and international grantmaking capabilities. As a global organization, our international capabilities have played a critical role in several of our initiatives decentralizing hiring and building teams in the Global South.

I'd love to share an example of so much of what we've been talking about in action.

The Missing Billion Initiative was founded in 2020 as a systems change catalyst working to mobilize the global health community to take action on building more inclusive health systems. This collaboration, developed by four women co-founders and driven by a team in which half of them live with a disability, addresses the inequities that cause people with disabilities to have significantly worse health outcomes than those without. After securing their initial funding, it became apparent that The Missing Billion Initiative would be able to work more efficiently with support in organizational compliance along with financial, grants, contract, and staff management. They came to Panorama as a startup seeking Model A comprehensive fiscal sponsorship and after several exciting conversations, we agreed that their mission aligned well with Panorama's own as well as our other work in the global health systems landscape. We're proud to fiscally sponsor this impactful initiative.

Since launching, the Missing Billion Initiative has been focused on cultivating relationships with funders and partners, building out their team, and generating impactful research. By providing HR, contract, and financial management services, Panorama has supported the Missing Billion Initiative's work which includes developing an assessment toolkit to help Ministries of Health assess their health system against disability, generating and sharing data through their reports, driving innovation around community health care worker training and inclusive primary clinic design, and mobilizing a movement by bringing stakeholders together to define collective projects. By partnering with Panorama to tap into our back-office infrastructure, the Missing Billion Initiative is fully establishing themselves as a systems-change catalyst for inclusive health unencumbered by the need to draft contracts or file organizational tax forms.

BFG: If folks are interested in learning more, how can they get in touch?

PG: We invite readers to fill out a quick contact form on our website to get in touch. We are always happy to connect, whether people have already decided fiscal sponsorship is a good fit or they're still unsure. We're also familiar with the broader social change landscape, so even if Panorama isn't the right fit for your needs, we can suggest other options.

Thank you again for this opportunity to share more info about a topic that too few are aware is even an option!

BFG: Our pleasure! We're always learning, and are grateful for you taking the time to visit with us on a solutions-based approach for leaders to consider as they seek infrastructure and support on their journey toward greater impact.

WELLBEING

FROM BURNOUT TO BLISS: ACTIONABLE INSIGHTS FROM A FOUNDER

By Natalie Rekstad, Founder and Chief Executive Officer| Black Fox Global

Realizing we were publishing more and more pieces on burnout in the Black Fox Brief such as We Need to Talk about Mental Health in the C-Suite, and Our Burnout Moment is a Good Thing, we decided to create a written post for the busy among us who want to take in the 'hacks' quickly; however, a listen here can help anchor them into a practice.

Leadership in the social sector frequently demands hard work and long hours, which can result in diminished effectiveness and burnout. In response to this, we produced a session for the 2021 Skoll World Forum's Wellness Hub entitled 'From Burnout to Bliss'.

The session focused upon how to shift your mindset and approach, and accomplish more for your mission in a sustainable way. The session also featured a guided meditation designed to help participants attract the funder/grantee alliances you seek, while grounding you in sustainable practices to maintain both your mental and physical health. While the meditation is focused upon and mentions the Skoll World Forum, it can be repurposed to any environment or situation.

If you are taking the time to read/skim this article, chances are that you do not need a list of burnout symptoms; your own experiences and feelings likely led you to click on the link. However, since burnout can sneak up on us, this resource may offer a name for some feelings that you've found unnamable. We can be "fine"… until we're not – crossing some invisible boundary.

As a former corporate executive, nonprofit founder and executive director for ten years, and founder and CEO of a B Corp social enterprise, I have the lived experience of – for years – burning the candle at both ends. Smart people learn from their own mistakes; really smart people learn from others' mistakes. So I am going all 'radical transparency' on you so you can be in the latter category. 🙂

In this post, I'll touch upon what drives us in unhealthy ways. I'll share some high-level hacks to free you up so you work in your "zone of genius" while creating space for others that support you and your organization to thrive in their zones of genius. I'll also get granular on some tried and true hacks for those of us with an entrepreneur/creative/visionary brain.

To be candid, I am on this journey with you. I am a bit of a "cautionary tale" of how to do work and life wrong, but am on the other side of it now (most days). I don't always get it right, but am delighted to share some of what I've learned over the last several years as founder who bootstrapped the beginning, and who is now at a place where I've made myself virtually obsolete in my own organization thanks to a great team and the infrastructure that is in place to support our Mission.

What drove me to the brink of burnout in the past are edges I still work on, but once I brought them out of the shadows, they have become gentler companions over time. I'll name some of those edges here in case any of you can relate.

- I have a belief that I will let people down if I don't meet their needs – in both my professional and personal life.
- This work, this sector, is a bodysnatcher – and most of us in the global space know this is one of our soul assignments. The stakes are just so high and there is always so much more to be done.
- I have a fear that if I am not on top of everything, then people will "find out" I'm not that smart (at least in the way that they are). Imposter Syndrome has driven me to some extent.
- I came up in the 1980s "do more, be more, have more" culture; in Washington, D.C. at that time, workaholism was a badge of honor.
- I came up in a culture that took the feminist message of "you can be anything" and hijacked it into "you have to be everything." (For example, the Enjoli commercial from the late 70s – "The 8 hour perfume for the 24 hour woman".)
- Last but not least, if I slow down I will have to feel the deep pain of my former marriage.

I unearthed these edges while completing my "Inner MBA" via the work of Robert Kegan and Lisa Lahey. They believe that change often fails because people focus solely on their behavior, but most efforts require both changes to a person's skill set – along with adaptive changes to a person's mindset. They posit: "Mindset transformation requires overcoming blind spots, unearthing our competing commitments, and freeing ourselves of limiting assumptions."

In the course, I had to map out ways that block progress – ways and why we are immune to change despite the strong desire to change.

This was never meant to be public-facing, but we have a culture of radical transparency at Black Fox Global, and of inviting the whole person into the work. So I'm going to take a deep breath and bring that into the blogosphere as well.

Improvement Goal	Doing/Not Doing	Hidden/Competing Commitments	Big Assumptions
3. PLAY!! Adventure! Deep rest.	3a. 'Work Ethic' - don't know how to play. 3b. I hunker down in coffee shop to work on beautiful sunny days when I could be at the beach. 3c. I am an 'island' and don't reach out to friends as much as I could.	3a. I need to stay on top of things. I need to look put together. 3b. I need to keep achieving - my "3" wiring. 3c. I need to be strong, self-sufficient.	3a. If I don't stay on top of things then I will look bad. 3b. I will let people down if I don't meet people's needs. 3c. People are busy, have own lives with families. I will seem needy.

Through this 'Immunity to Change' map, you can see how mindset, fear, and false beliefs kept me in a cycle of doing vs. being. My competing commitments and assumptions drove undesirable outcomes and contributed to burnout.

We are human "doings" – we like action, we are wired for action – but at our core, in our stillness, we are human BEINGS. This is home; this is where we recharge. It has been my slow learning, decades-long learning, to trust just "BEING". And the magic is that doing so (being so) has enabled me to be far more effective on so many levels, most of all as a visionary and one who can lead vs. being in some of the trenches where I have no business being. Now, let's get tactical on how you can bring more bliss into your lives while still caring for your mission, your colleagues, your partners, your loved ones. First, we don't get to effectively play in the vision space without an infrastructure that supports us in our work and in our success.

Why does it matter? As a social entrepreneur, I always have the visionary "app" running in the background. Turns out that is a good thing – it means I can solve problems or connect dots effortlessly while "off duty". But I have to have "off duty" time to create the space for this to happen. This harkens back to an article I read a number of years ago and in the past referred to from time to time longingly as aspirational: "Darwin Was a Slacker and You Should Be Too". The piece highlighted how he and other giants would work just four hours per day. While I cannot turn off my entrepreneur brain other than in meditation, or absorbing activities like skiing really fast or sleeping, the GOAL now is to be in a chair just four hours per day maximum, including all meetings/zooms.

This post is not to say that I have it all figured out, but we all have hacks we discover along the way. Here are some of the Black Fox Global hacks that can be adapted to you and your work depending upon what fits.

1. Mindset Shift | My company is not about me, my caregiving, my work ethic; it's about the Mission. The North Star question had to become: What does Black Fox Global need? The key question for me: What does Black Fox Global need from me, the Founder. The Firm needs me to be grounded and supported, my wellbeing a priority. Black Fox Global does not need me to take care of everyone around me, to put others' needs above my own or the firm's at the expense of the Mission.

This new lens enabled me to make hard decisions that resulted in greater overall health, sustainability, and boundaries of the company, and boundaries for myself. It set me free from feeling I needed to hold up the sky for everyone involved in the firm. It was a false belief that ultimately served no one and limited our capacity for impact.

2. Part-time Virtual Assistant* | Julie Cullings has been supporting me and the company 10 – 20 hours per week for over five years. That would be time I would have had to spend on areas that were not my zone of genius and would have often resulted in my working 50-60 hours per week, with diminishing returns per hour.

- The virtual assistant company Fancy Hands, for the cost of between $12-$15 per hour, helped turn me into a Delegating Ninja. This service can be used for any number of things in my professional and professional life. It frees me up enormously to stay in the work that is uniquely mine to do. For example, I can have a VA LinkedIn connect me to everyone who attended our webinar with a specific note, or help track down email addresses for follow up. Over the last few years, my Fancy Hands dashboard says I have saved the equivalent of 11 days (definitely more than that). One of the assistants from Fancy Hands with whom I've worked for years has now been hired specifically for Business Development support. This higher level of service goes for around $30 – $35 per hour. In short, be clear on what is working, what is not working, and find someone you trust who can take that mental load off.

- Catchafire.org is a social sector volunteer platform that matches nonprofits with volunteers who invest their time and skills to support varied needs and projects; everything from copywriting to graphic design to strategy development to recruiting, and more.

- Upwork.com is where all manner of support can be found, from graphic design ($50 per piece) to wealth screen support, to my Zoom-based personal trainer who is Serbian but based in Dubai. In fact, this is where we found my beloved Virtual Assistant, Julie Cullings.

- A dear friend has a great VA via My Outdesk. It took a few trials to find the right match, but became a very high level Executive Assistant.

3. Fractional COO | In 2019, we were unable to keep up with the demand for our services because we didn't have a solid enough infrastructure and team members in place that would enable us to smoothly onboard new clients and serve them at the level required. This resulted in our having to begin a waitlist, so I sought a fractional COO to help solve the problem, someone with Executive-level talent who had systems and operations as two of their main zones of genius. This was game-changing because by the time the pandemic hit, we were able to say yes to the large influx of new business. Within 90 days, the new COO put systems in place and created a job description for a Project Manager, which garnered over 500 applicants. The COO whittled that 500 down to three finalists for me to interview. While the COO was 15-20 hours per week or so for the first 90 days, after a Project Manager was hired, she eventually scaled back on the number of hours and transitioned to more of a strategic advisory role. This then eventually turned into a more permanent COO position in the company, filled by a new hire. But the fractional COO model was just what we needed to work through balancing high demand for our services with limited operational resources.

4. Daily Mindfulness Practice | Centered around abundance, gratitude, and calling in more light to my energy calling in energy for the highest potential of Black Fox Global. I am clear that founding this firm and serving as its leader is one of my soul assignments. I humbly and delightedly carry out that assignment with as much support as the Universe wants to provide – which is significant. I also set my intention for the day and say a prayer of gratitude that I get to do this work in a community with giants. My prayer at convenings includes, "May I go where I am needed most today".

5. Granular Hacks | As previously stated, this post is not about my having it all figured out; I don't. But we all have hacks we've discovered along the way. I've shared some of my higher-level hacks, now here are some of my more granular hacks.

- Ruthless with EMAIL, three categories: Do, delegate, delete. If it is mine to do and takes two minutes or less – DO IT – I do not look at it twice or ten times.
- So that I do not become a bottleneck, I ask that team members put in the email subject line: "3 minutes or less – response needed by X date/time (or 10 minutes, whatever the case may be).
- SOS Score, Scale from 1 – 10. I would do this in my weekly meeting with our COO when she first came on board and during crunch times – I would give her my SOS score, and we would talk about what needed to happen to lower that number.
- "Do It Ugly" but get it done. (Internal company FAQ: What's up with all of Natalie's typos? I type 100 wmp, going for speed and moving something forward if it is an internal communication.)

- "The ugly first draft" – curate the content, salient points, have someone else do the ugly first draft, like Fancy Hands or AI. That ugly first draft gets me farther faster, and I can then edit and craft it into my own voice and weave in my perspectives. For example, I sent my outline for the Skoll webinar to a team member who then created the first draft of this blog.
- If someone can do something 80% as well as I can, delegate it. Good enough is good enough.
- Litmus test: Does doing this map to accomplishing my BHAGs? My priorities? Does this move X forward? (My current lens: Does this help move $1B in new funding into the hands of proximate leaders in the Global South?). If it doesn't map to my priorities, is it FUN? It is always fun, it is always an honor to teach – so I say yes to things that bring me joy and juice.
- Giving myself permission to slow down, enjoy the success, enjoy the relationships – seek a depth of connection in my work with team members and client leaders. I give myself permission to take a walk if that is what I need. Write yourself a "Permission Slip" if that helps. Take the work seriously, but not yourself. Enjoy yourself!

May you find the bliss you seek so that you can be a more effective leader and human the world needs all of us to be!

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POWER PAUSE: REFLECTION AND INTENTION

By Natalie Rekstad, Founder & Chief Executive Officer| Black Fox Global and Nina Urman, CEO Coach

It was with great pleasure that we at Black Fox Global began our year with the incomparable Nina Urman for Power Pause: Reflection and Intention. We are so grateful to Nina for sharing her gifts with our community on a pro bono basis – her time and talent are valuable, but she wanted to serve this community of mission drivers as part of her own philanthropic investments in humanity.

While an offering of this nature is a departure for Black Fox Global, one of the things I know for sure is that those of us with vocations in the social sector work incredibly hard — because the stakes are so high, burnout is all too common. Introducing you to a true Master Coach to assist us in living wholly, so we can show up in our work more authentically and rejuvenated is a true honor for me.

Nina's focus is holistic: on spiritual, mental, emotional, and behavioral change from within. It is NOT just about positive thinking or the Law of Attraction. It's cognitive, psychology-based techniques and insights that upgrade all areas of life.

You can access a recording of the session HERE

So many participants expressed gratitude for the Pause and wondered how to take it into their lives beyond January. One suggestion is to listen to this recording on a quarterly basis and adapt it to the last 90 days. We also encourage you to share this with your teams, hosting a session by doing a screen share of the video, and doing the workshop together.

I also invite our female readers to join me in Nina's CIRCLES, a wonderful, connected community of women from around the world. The group's private WhatsApp feed is powerful, including frequent mini-videos by Nina for "tune-ups". Reach out to Nina to join the group.

May your year and your fundraising be filled with light, love, and deep breaths as we learn to Pause and Reflect so that we can move forward in manifesting our dreams from a place of strength and wisdom.

You've got this!
In light,
Natalie & Nina

THE HUMAN ELEMENT: NAVIGATING PROFESSIONAL SPACES IN TIMES OF COLLECTIVE UNCERTAINTY

A 2025 conversation with Black Fox Global, Story & Spirit, EdelGive Foundation, and Friendship Bench Zimbabwe

Black Fox Global COO Lisa Heinert recently hosted a conversation with Naghma Mulla (EdelGive Foundation), Lena Zamchiya (Friendship Bench) and Michael Kass (Story & Spirit) about how we bring the human element to key sector convenings. The following is a summary of the conversation; you can view the full recording here.

Beneath the carefully crafted agendas and strategic meetings of next week's Skoll World Forum lies a deeper truth we rarely acknowledge: each of us arrives not just as organizational representatives, but as whole humans carrying personal and collective weight through an increasingly uncertain landscape.

The social impact sector is navigating some of the most challenging conditions we've seen in years. From US executive orders and major USAID cuts to attacks on DEI and shifts in European funding, our field faces unprecedented disruption. For many organizations, this year's convenings aren't just important—they feel essential to survival.

At the same time, each of us comes to the convening as a human and we're showing up in Oxford next week carrying not only our organizational goals, but also a lot of personal and collective weight, experiencing grief, anxiety, uncertainty.
To discuss the complexities inherent in coming together at this time, we invited a group from across the impact sector to have a conversation about balancing humanity, impact, and heart-centered connection at Skoll and other upcoming convenings. Here are some of the highlights:

Arriving with Purpose Amid Uncertainty

"For this year I think we're arriving with purpose," reflects Lena Zamchiya, Interim CEO of Friendship Bench Zimbabwe. "However, recognizing that there's a lot of uncertainty in the global marketplace in relation to the funding landscape, not knowing what the future holds."

This tension between purposeful action and contextual uncertainty defines our current moment. While the ground shifts beneath us, we still need to advance our missions with clarity and determination. As Lena notes, this paradox requires internal reflection and strategic pivoting:

"Internally, as an organization, we've also had conversations around what does this mean? And so, being deliberate about the need to pivot, the need to be able to step up, the need to also identify systems and processes that can enable us to really continue being sustainable."

The consolation in this challenging moment, Lena reminds us, is that "this is not an independent or isolated way of thinking, and the consolation is that others are also experiencing it. I think that provides strength in community."

The Disorientation We Share

"The word disoriented keeps coming up," reflects Michael Kass, Founder of Story and Spirit. "A lot of the folks I'm speaking with, they aren't necessarily consciously experiencing grief or anxiety. It's mostly disorientation, which makes sense because so much has shifted in the international impact sector so quickly and in a way that is chaotic and confusing."

This collective disorientation cuts across roles and organizations. Funders aren't immune—they too navigate shifting priorities, uncertain metrics, and challenging decisions about resource allocation. Even as we seek answers and clarity, perhaps what we need most is acknowledgment that none of us has figured it all out.

As Lena observes, "With all the chaos and disorientation that people are feeling… everybody's out of step, recognizing that this was not planned for. And so it brings an uncertainty around what the future holds."

The Comfort of Our Echo Chambers

In times of uncertainty, we naturally seek the familiar—gathering with like-minded colleagues who share our perspectives and validate our experiences. Yet this comfort can become a trap.

"The trap that we tend to fall in is we're talking so much," cautions Naghma Mulla, CEO of EdelGive Foundation. "There's almost this collective sense of camaraderie and connection that it also gets a little comfortable after a while to be with friends who co-feel… it's actually the enemy of action."

How often have we left convenings energized by stimulating conversations, only to realize weeks later that the energy never translated into meaningful change? The paradox of professional gatherings is that connection without action may reinforce our sense of powerlessness.

Finding Balance Through Intentional Presence

The pressure to maximize every minute at these gatherings can lead to burnout and diminished effectiveness. Lena offers this practical wisdom: "Don't feel pressured to connect with everybody. Also step out and take time for yourself. So if you feel that you've just had enough for that day, find a coffee shop and go and sit in a coffee shop and have a coffee and disconnect for 30 minutes or an hour."

This intentional disconnection creates space for processing and integration. As Lena explains, "That may then also help you just in terms of the whole aspect around mindfulness, so that when you're ready to go back, you're in a preparatory mode to then engage with others and connect with others."

In a landscape where there are always more connections to make and conversations to have, choosing moments of solitude becomes not self-indulgence but strategic renewal.

The Power Dynamics We Navigate

These spaces also illuminate the hierarchies that shape our sector—hierarchies we may intellectually reject but emotionally feel.

"These convenings or occasions… also become a point where we are most conscious of the power hierarchies that come with who we are, how large, how small, how much in need, which part of the world," Naghma reflects. "It's also the sharpest—our differences and our relative sizes to each other, relative strengths to each other also prominently come back."

For those seeking funding or partnerships, the pressure can be overwhelming. You see others in constant meetings while your calendar has gaps. Social media amplifies this sense of inadequacy as peers post photos with influential figures. "There's a lot of pressure," Naghma acknowledges. "You're in a dining room, and every table seems to be meeting except for me."

Harnessing Collective Wisdom

Lena reminds us that the true value of these gatherings lies in mutual learning and shared problem-solving. She describes going to Skoll "with purpose, looking to see how we can connect with other social entrepreneurs as well as funders, just in terms of harnessing collective wisdom, to be able to create solutions that are both meaningful and sustainable."

Rather than focusing solely on what we can gain, this perspective invites us to consider what wisdom we can exchange: "Asking the right questions around, how have they been able to navigate the challenges that they've been presented in these precarious moments? What are the lessons, and then understanding their experiences. And then also providing an opportunity for us to also share our own experiences. I believe it's a give and take."

Authenticity Without Full Disclosure

So how do we navigate these complex spaces with both professional purpose and human vulnerability? Michael Kass offers a key distinction:

"Authenticity is not the same as full disclosure. A lot of times people think, 'Oh, to be authentic, I have to tear my heart open and talk about all of the painful things with someone.' You can also talk about pigeons and be 100% authentic."

This framing liberates us from the false binary of either maintaining an impenetrable professional facade or sharing our deepest struggles. Authentic connection happens when we bring our real selves to conversations-attentive, curious, and honest about where we are without needing to share everything.

Beyond Strategy: Trusting the Unseen

For all our careful planning and strategic preparation, sometimes the most powerful moments arise when we trust something beyond our control.

"The idea of consciousness or spirit as a guide—that it's not all on us," Michael suggests. "Whenever we talk to another person, and we're in deep connection, there is a consciousness that emerges in the space between us… Skoll as a forum has a consciousness that we can connect with for guidance, inspiration, and help."
While this may seem esoteric in a sector driven by metrics and evidence, many leaders recognize the intuitive dimension of their work—those moments when the right connection happened not through strategy but through some inexplicable alignment of need and opportunity.

Lena captures this in her simple yet profound observation: "Each person's reality is unique. And to embrace that." This acknowledgment invites us to approach each interaction with openness rather than preconception, allowing space for the unexpected insight or connection.

The Grace to Be Imperfect
Finally, as we prepare for these high-stakes gatherings, we must extend compassion to ourselves and others. "It's okay to have flawed experiences," Naghma reminds us,

"to come back thinking we should have done something else, to just be comfortable with that."

Like building muscle, navigating these complex professional-personal spaces takes practice. We learn through trial and error, through conversations that didn't go as planned and opportunities we missed. Each experience builds our capacity to show up more fully the next time.

As we converge in Oxford next week—or at any gathering where important work happens—let's remember that behind every title and organizational affiliation stands a person navigating uncertainty, just as we are. Let's create space for both strategic action and human connection, recognizing that the most powerful partnerships emerge when we bring our whole selves to the table—prepared but not rigid, professional but not detached, strategic but not calculating.

In times of collective disorientation, perhaps our greatest contribution is simply showing up as we are—present, honest, and open to what emerges between us.

WELLBEING IN TIMES OF UNCERTAINTY & CRISIS

A Conversation with Black Fox Global and Dana Preston with The Wellbeing Project

As conference season kicks off, we checked in with our friends at The Wellbeing Project, leaders in catalyzing a movement integrating well-being into social change. With the Skoll World Forum approaching, we explored strategies for making the most of attending convenings and navigating these wildly uncertain times as social change leaders.

BFG: Tell us a little bit about the history and mission of The Wellbeing Project.

TWP: The Wellbeing Project was founded on the belief that the wellbeing of individual changemakers has ripple effects that directly impact the success of social and environmental change movements as a whole. Grounded in this core and proven principle, we are catalyzing a network of social change organizations and changemakers who are re-imagining how wellbeing is fundamental to the success of our collective social change work in benefit of people and the planet.

The growth of our global movement is guided by three core activities – research and storytelling, community building, and the acceleration of local wellbeing initiatives. As the stewards of a movement that is bigger than ourselves, we are building the infrastructure for organizations to drive a sea-change in both how social and environmental change movements are led and implemented – and the ultimate societal impacts they achieve.

BFG: What emerging trends have you observed in the impact sector concerning burnout, and how are organizations and leaders holding up?

TWP: 2025 has been an incredibly challenging year for the sector, particularly with the shockwaves of the USAID funding freeze. Other Global North countries have followed suit, signaling what feels like a paradigm shift in development and social change. The abruptness and severity of these decisions have been devastating—leading to loss of life for those reliant on critical health services, mass layoffs of aid workers, and, at best, a deep sense of anxiety, fear, and disillusionment across the sector.

Through our network, which spans 80+ countries, we're hearing firsthand how hard this moment is. And yet, we're also seeing something remarkable: the organizations and leaders who have intentionally prioritized wellbeing—both individually and institutionally—are navigating this crisis with greater resilience, care, and open-mindedness. One of our partners in West Africa shared that as soon as the news broke, they convened local nonprofits to create a space for processing, resource-sharing, and mutual support. It was powerful to hear them reflect—not just on the immense harm unfolding—but also on the deeper realization that long-standing dependence on Global North economies and policies was never truly serving their communities. They were holding both the grief and the possibility of something different: a locally driven, self-sustaining vision for development and aid.

We know many of our network members are playing this critical role in their own regions—holding space, fostering resilience, and helping reimagine what's possible. This moment has only reaffirmed how vital our mission is: to embed wellbeing at the heart of social change, so we are better equipped to navigate crises and, hopefully, not just endure—but thrive.

BFG: How is the TWP team doing? What practices or strategies does your team use to promote organizational wellbeing while responding to the needs of the sector?

TWP: It's been a layered and complex time for our team. On one hand, the pull to do more has never been stronger—especially given everything unfolding across the sector. We're constantly being tested to hold our own boundaries, to resist working ourselves into the ground, so that we can show up fully for our network members and for this movement. At the same time, we're just three months away from hosting the Global Hearth Summit, a joyful, deeply intentional gathering that celebrates changemaker wellbeing through community and belonging. It's all hands on deck, and while the workload is intense, we're also feeling more inspired every day to create something truly meaningful.

To help us navigate these ebbs and flows, our People + Culture team developed a global team map that highlights the busiest periods of the year and the quieter ones—what we call our "blue zones." These are intentionally lighter stretches where we encourage a slower rhythm, spaciousness, and rest. During these times, TWP also offers contemplative practices for the team, giving us opportunities to pause and recharge. Having this mapped-out cycle has been invaluable—it reminds us that the intense moments are temporary, and a more restful period is always on the horizon.

One of my favorite wellbeing practices is something we do every Monday in our all-team meeting. We close with a reading from one of TWP's Elders, our in-house poet, who shares a poem with us. These moments of pause, introspection, and reflection are priceless. They remind us why we're here, ground us in something bigger than our to-do lists, and offer a touchstone of care and presence as we move through the week.

BFG: What other successful strategies or programs have you seen organizations implement to promote wellbeing among changemakers, particularly in high-stress roles?

TWP: It's been heartening to see more social change organizations investing in the wellbeing of their teams in tangible ways—from sabbatical programs to wellbeing stipends to team retreats centered on care. These aren't just perks; they're necessary interventions to sustain people doing high-stakes, deeply demanding work.

One initiative that stood out to me recently was from an organization that invites employees to make a personal wellbeing commitment at the start of each year—something meaningful but doable, like setting clear boundaries around work or prioritizing rest. If they stick to it, they receive a cash bonus at year's end. The person I spoke with had committed to not checking email over the weekend, and knowing there was an incentive helped her follow through. More than the bonus itself, it was the permission—both personal and organizational—to prioritize wellbeing that made a real difference.

This kind of approach reminds us that wellbeing isn't a luxury—it's something that needs to be built into the way we work, lead, and sustain movements over the long haul.

BFG: Conferences can often be overwhelming, especially given the current funding crisis caused by USAID funding cuts. As attendees prepare for the Skoll World Forum, what advice do you have for staying balanced and healthy while also maximizing the opportunities that a gathering like Skoll presents?

TWP: I've never been to Skoll before, but I've heard how intense and wonderful it is—a space where so many passionate people come together to exchange ideas, challenge assumptions, and spark new collaborations. Based on my experiences at large conferences, I know how easy it is to get swept up in the momentum—to move from one session to the next, from one conversation to another, without a moment to breathe.

One of the things we earnestly try to practice at The Wellbeing Project is presence. The most meaningful moments often happen in the spaces between—the quiet reflection after a thought-provoking session, the unexpected conversation that shifts your perspective, the moments when you allow yourself to simply pause and take it all in.

A few things to keep in mind to stay balanced and present at Skoll:

- Check in with yourself. Stay connected to both yourself and why you're at the conference in the first place. Are you feeling exhausted? Overwhelmed? You might be better served by skipping a meeting or sitting out a session to make sure you remain grounded, present, and open to meaningful connections.
- Get outside. You'll likely be indoors for most of the conference, so take short walks whenever you can. A 10–15-minute break outside can help quiet the mind, refresh your energy, and give your body some love. You might even consider suggesting a walking meeting instead of sitting indoors!
- Stay hydrated. Traveling often throws off our usual self-care habits. Bring a reusable water bottle and make it a point to refill it throughout the day. Small habits like this can make a big difference in keeping your energy up.
- Lead with humanity. No matter your position or role, remember that everyone at Skoll is human first. Approach networking with warmth and curiosity, whether you're meeting someone new or spending time with longtime colleagues. Some of the most valuable moments happen when we drop the formalities and just connect as people.

At The Wellbeing Project, we often say that wellbeing isn't a luxury—it's essential. It's what allows us to navigate uncertainty, sustain our work, and, ultimately, show up as our fullest selves. My hope is that everyone attending Skoll can find ways—big or small—to take care of themselves while engaging deeply in the conversations that matter most.

BFG: What's next for The Wellbeing Project and how can the Black Fox community get involved, and support your work?

TWP: We're at a turning point at The Wellbeing Project as we take the next bold step in mainstreaming wellbeing in the social change sector. For too long, burnout and exhaustion have been seen as inevitable costs of making a difference—we're working to change that.

In June, we'll host the Global Hearth Summit in Slovenia, bringing together over 1,200 diverse changemakers to advance a profound and hopeful vision of individual, collective, and planetary wellbeing through art, community, and belonging. This isn't just another conference—it's a space to reimagine what's possible when we center care, connection, and renewal in our work.

How can the Black Fox community support?

- Join us at the Global Hearth Summit—whether in person or by helping bring others to the table. Express your interest in participating here.
- Fund wellbeing as a strategic priority. If you're a funder, let's talk about how to integrate wellbeing into your grantmaking and ensure that those driving social change are resourced to sustain their work.

- Spread the word. The more we talk about wellbeing as a fundamental part of impact, the more we shift the narrative and the field itself. Share our work, bring these conversations into your networks, and help us make this movement impossible to ignore.

We know that deep, systemic change happens when movements and funders align. If you're reading this and it resonates—let's connect. This is the moment to invest in the people behind the change.

A space designed not just for learning and connection, but for experiencing what a world centered on wellbeing, care, and belonging could look like. The Summit is more than an event—it's part of a broader shift toward embedding wellbeing into the DNA of the social impact sector.

Beyond that, we're strengthening regional ecosystems of wellbeing, working with local funders and organizations to ensure that support structures for change-makers exist not just in moments of crisis, but as an ongoing, sustainable reality. Stay connected and updated by signing up to our newsletter here!

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The Black Fox Global team equipped me with the tools, knowledge and confidence to engage with donors and raise money on our own. Best of all, they helped us remove the fear and anxiety we felt around fundraising; the empowerment aspect has been invaluable.

Launch Girls

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As someone new to international fundraising, it was invaluable to have a team with the level expertise that Black Fox Global has. They brought generous insight, creative problem-solving, and became a true extension of our work.

Partners in Agriculture

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Every once in a while you come across an organisation that does far more than just talk the talk. Black Fox Global is such an organisation. The professionalism, kindness, and sheer expertise of the team is second to none. We have come on leaps and bounds since bringing them on board and are so incredibly grateful.

Sir Ken Robinson Foundation