**Hilda Polanco, BDO (she/her/hers):** Welcome, everyone, to our webinar today: *Individual Giving – How-To Strategies to Buck the Downward Trends*. This is Part 2 of a two-part program that we have been delivering, focusing on individual giving, one of the most important sources of revenue for nonprofit organizations.

**Hilda Polanco:** First, before I begin, I'd like to thank our sponsor today, Diamond Hill. The investment firm Diamond Hill is proud to sponsor the webinar and to learn more about their investment products and the commitments to the clients, and the sector. Please visit [www.diamond-hill.com](https://www.diamond-hill.com/). So again, thank you very much to our sponsor.

**Hilda Polanco:** To begin, I want to remind us all that these programs are part of the Financial Commons program. We have moderators that are with us in each of the programs. Today, we have Mark Hager with us, but Wade Rogers is also a moderator—as is Dana Britto, who is on the program today, and therefore we don’t have her here in this role.

**Hilda Polanco:** The Q&A is a critical part of the program. If you have any questions, don't wait; ask us when it’s fresh in your mind. And also, if you feel that you can respond to any questions, please do that. This is what makes the comments special. It’s a community where we share our own knowledge and expertise and bring others along in the process.

**Hilda Polanco:** As always, we bring together a combination of consultants and advisers that are part of the financial Commons family, and we have voices from the field. And we're really excited today for the combination of those.

**Hilda Polanco:** These will be the presenters from within the Financial Commons team. I will be part of the program. Dana Britto, who is also a moderator, as I mentioned, consultant to nonprofits and foundations. The one and only Ruth McCambridge, who is the Director of Content for the Nonprofit Commons. We have Melissa Cameron, who is a colleague of ours from BDO, who is going to join us for part of the program as well. Our guests are really the richest part of the program.

**Hilda Polanco:** We have two organizations being represented here today. And when we deliver these programs, the idea is to bring voices from practitioners who are really bringing to life the concepts that we are bringing to you. We want you to hear firsthand how leaders are really putting into practice some of the advice that we bring. So, we have Cree Rose Dueker from the Native Governance Center, as well as Lauren Kramer, also from the Native Governance Center, and they will share their experiences in their individual giving trajectory. We also have Ari Solomon from the Jewish Voice for Peace, and together they will be sharing their thoughts. It will be much like a conversation with each of them that you will be… imagine a fireside chat with these guests.

**Hilda Polanco:** We will be trying a few different things in this program, compared to past programs, and connecting some of the questions that have come in from the field since the last session, and continuing to answer as many questions as possible that have come in to us? And so, we want to just again remind you that this particular program on individual donor giving is part of the longer series that we’ve worked on to provide you with a sort of business model framework: How do we think about leveraging each of these sources of revenue? And we've had programs for all of these—except the membership, which is coming later in the year.

**Hilda Polanco:** Let’s dive in to today’s program. And we’re going to start by asking Ruth to walk us through some of the questions that just kept coming in from the last program, and they were so clearly on the minds of many that Ruth opted to go through some of the answers with you. So we may be answering your question, or we may be addressing a question that's been on your mind, and was on the mind of many who were with us previously. So, Ruth, I'm going to ask you to start with the first question, and we'll give some of the answers as well.

**Ruth McCambridge:** Right. Hi, everybody! I have the great good fortune of going through the hundreds and hundreds and hundreds of questions that we get, associated with each one of these webinars. I read every single one of them. And then, for the questions that we get a lot of, we do try at some point to follow up and answer them. We decided to do that in this session today, because some of them—there were some that were so commonly asked that we thought, why not just go ahead and answer them if we can?

**Ruth McCambridge:** So, the first one—and these are all from you guys, if you came to the last webinar or in preparation for today’s session—are major donations up or down across the United States, and what constitutes a major donation anyway? So, the first answer that I have to that is: What constitutes a major donation to *your* organization is purely circumstantial. So, to you, $100 may be a major donation, or $20,000 may be a major donation.

**Ruth McCambridge:** There are some categories of donation, though, that I want to just talk about really quickly, because they have to do with some major with some larger trends. So, as you know, if you came to the last session, we're dealing across the country with this thing called the “dollars up, donors down” phenomenon, which means that despite the fact that there are fewer and fewer donating households across United States, we aren't seeing that change in the donor dollars that are coming in. So if you look at these two charts, one of them shows you the declining number of people who are giving to charity, and the next chart, which is over to the right-hand side, shows you, in the category of Mega-Gifts, how that category has grown over the last few years.

**Ruth McCambridge:** This becomes really important. I'm just gonna talk for a minute, because that that categorization of something as a mega-gift (or not a mega-gift) actually is not stable at all. So, in 2013, Giving USA defined a mega-gift as anything over $80 million. I think we'll all agree that’s a mega-gift. And there were about $4.26 billion in mega-gifts that year. By 2014, there was $6.2 billion in mega-gifts at $80 million. By 2016, they had redefined mega-gifts as anything over $200 million; by 2017; they were defining mega-gifts as anything over $300 million. So, as you can see, there's something happening here in terms of wealth gap and giving that is highly disturbing in terms of democracy and the fact that we are actually representing the interests of people that maybe are getting out of the habit of giving.

**Ruth McCambridge:** So can we go down to the next one? The other concern with depending more on money from people who have a lot of money and who can give mega-gifts is that they give to different things than other people give to, and as you can see, the three categories here that they give the most to are major institutions: foundations, colleges and universities, and donor-advised funds. In all three of these, any spending for results is going to be delayed. In colleges and universities, that money may be going into endowments and foundations; in donor-advised funds, that money could be disappearing for many, many years, and possibly generations, before it's given away. So, that money actually doesn't count in most of our coffers. Can we go down to the next one?

**Ruth McCambridge:** The next question is, what's a healthy donor mix? I'm just gonna very quickly say that one of the most important metrics in this is that you're keeping the right number of donors, rather than just depending on acquiring new donors. You always have to be acquiring new donors to keep a healthy mix, but if you're not retaining donors—not just over the first-year conversion, but of the second and third years—then you're going to end up costing your program a lot of money, because it costs more to get a new donor than to keep a former donor. And, retained donors tend to give more.

**Ruth McCambridge:** So those two things are very important, but also important are things like generational issues. I noticed some people were asking questions like, “I know our donors are aging out. I think none of our donors are younger than 60. Should we be worried?” Yes! You should be very worried, and you should be studying all that material that tells you who responds to what kinds of appeals. Because they're very definitely generational differences in who responds to what kind of mechanisms. (Not just online, but some people respond to things like peer groupings, etc., etc.) That is actually important, not just for younger and older donors, but also for identity groups within our donor groups.

**Ruth McCambridge:** Okay, going to the next one. What's a healthy donor mix? This gives you some idea of what the standard is, although that standard is nowhere near what it should be in most experts’ opinions.

**Ruth McCambridge:** Going to the next one… okay, how is individual giving performing across budget sizes? So, this actually doesn't answer that question, this this chart. But it tells you how important individual giving is for one size of organization or another, and as you'll see, it's extremely important for smaller organizations. But it's still very important for larger organizations; just in a different way. Very often, sometimes in larger organizations, it’s important because it isn't restricted. Smaller organizations, it may be almost the whole or a good part of their base.

**Ruth McCambridge:** So, how is individual giving performing against budget sizes? I was actually surprised to find research this year, because my assumption was that it was performing worse in smaller organizations, because larger organizations are able to keep pushing on individual donations even during recessions, because they've got the money present and the infrastructure present to do that. But it's actually not true. I saw this year that a lot of the larger universities are experiencing a decline in smaller-level donor gifts.

And it's really affecting them, and they're worrying about their future because of it. The sustainability is in those gifts, the gifts that come in small and grow over time. And so, it's very, very important to pay attention to that. And, for larger organizations who are experiencing the larger dollar gifts but a decline in lower dollar gifts, they’re basically acting foolishly, because what they're doing is… that's their pipeline. The smaller dollar gifts, they come in from alumni, etc., you know, early on, and then begin to grow over time as people get older.

**Ruth McCambridge:** This is the final one: How do you access dollars in donor-advised funds? Damned if I know. I think what you have to do, and I say this to people all the time, is you have to treat them like individual donors who like to stay anonymous, in some cases, although not all of them are anonymous. But there's so many transparency problems with donor-advised funds that I can't really tell you how you're gonna access people in those in those funds. There's not a lot that helps you to do that at the sponsors of the donor-advised funds, although that may change over time. What you should do is, you should… a lot of what you may call “individual donations” may come in through donor-advised funds, and you should just keep an eye on that, so you don't feel like you’re completely losing out in that area. Most donor-advised funds will act more like individual givers or small foundations than they will like anything else, anything other than that. (*Hidden* small foundations.)

**Ruth McCambridge:** With that, I'm gonna hand it over to Hilda.

**Hilda Polanco:** Thank you, Ruth. So, what we'd like to do now… We've given you these framing answers to the questions that came up in the last session. I'd like to transition now to a conversation around the technology—the technology infrastructure that is necessary to be able to successfully manage these donor relationships, to successfully acquire donors, and to stay in touch with these donors. This question comes up all the time as individuals, as organizations and leaders are thinking about diversifying revenue and focusing on the individual giving. I am going to ask Melissa Cameron from our team at BDO to walk us through some of the considerations on the building of the infrastructure and some critical concepts to keep in mind. So, Melissa?

**Melissa Cameron (she/her), BDO:** Sure, thank you for that. So nice to be here with you all today. Yes, as Hilda said, I'm going to spend just a little bit of time thinking through some of those key considerations for technology and infrastructure improvements in your individual giving programs. And I'm sure, as we're all aware, in recent history, the number of systems and solutions that are designed specifically to support fundraising or donor management has really exponentially exploded. And now we're seeing more than ever that it can be very enticing for organizations to implement software, but they may also then accidentally fall into a trap which I’ve often seen—actually have done myself—which is that it can sometimes be assumed that this technology is a one-size-fits-all or out-of-the-box solution. And so, before you dive headfirst into some expensive technology suite, I really want to encourage everyone to think through: What is the most appropriate technology ecosystem for you and your organization, based on your strategy, your approach, and your business model?

**Melissa Cameron:** So, at its core, individual giving really requires, fundamentally, just a database to store and track information about who your donors are, how much they've given, and what has motivated them to give to you in the past. For organizations with very few individual donors, you may find that a simple Excel file is perfectly adequate to track this information. But as you start to increase your individual giving program, we start to see a higher volume of transactions, higher volume of donors themselves, or even just more staff members on your team dedicated to supporting your individual donation program. You start to maybe, you may want to think through employing a more robust or comprehensive CRM, which is a customer relationship management network.

**Melissa Cameron:** And so, as we think about that kind of primary fundraising database, that very core of your fundraising program, you may start to see that, based on what you employ or what you choose, there are going to be some ad hoc modules or additional technologies that you might need to consider. And so, as you think about what is the full ecosystem of your individual giving software at your organization at its core, you may ask yourself, does our fundraising database actually provide us with a credit card processor? Not every database does. Certainly, if you're using something that is less integrated with your overall systems and structures, you may find that you actually need to bring a different credit card processor on. You may also have a credit card processor which allows you to process a single gift, but perhaps you want to really strengthen your recurring gifts program. So how do you automate that process? And thinking through, where and how that might be integrated into that fundraising database and CRM.

**Melissa Cameron:** And then, of course, if you're an organization who maybe has one-off events such as a gala—let’s say you have an annual gala—you may find that you have enough of a need for some additional event management capacity. So, this might look like something that would allow for inventory control of your ticket sales, or it might be tracking those donated items. Tracking auction bids or raffle wins. So, what is that kind of additional functionality that may not automatically come baked into your fundraising database? And then, of course, for that event management, you may also need to access a separate credit card processor—or, potentially, even another third-party giving system, depending on which approach you take.

**Melissa Cameron:** For those third-party giving systems… you know, I think that we've all become very familiar with some of our crowdsourcing fundraising opportunities. We've got Give to the Max. We have, of course, Amazon Smile, for instance, or the Facebook giving. There may be additional systems which will not be integrated with your own database but that you need to make sure that you're pulling in as much data as possible so that you continue to understand and know who your donors are.

**Melissa Cameron:** And then, of course, how you engage with your donors is often equally as important as tracking and managing, so we start to see those additional marketing technologies that you might employ, which will hopefully integrate in some manner with your fundraising database so that you're allowed to really understand any analytics that might be contained in those marketing communications, allow you to customize your campaigns for very targeted segmentation, and hopefully eventually be fully integrated into a CRM.

**Melissa Cameron:** And then we also have here our programs database. I actually included this pretty specifically, because I come from an arts management background, and so, where I worked previously, our program participants were also very much our biggest donors, or most likely to give to us in some sort of individual capacity. So, do you have a separate database for tracking that program information, or are you able to combine it and layer it in with your fundraising database? How do these two need to speak to each other so that you can fully understand who is within your community of giving? And how do you best meet them where they're at?

**Melissa Cameron:** And then, of course, we want to make sure that all of this eventually feeds into your accounting and reporting software. If you are using your accounting software to manage each individual person who's giving you a donation, that may not be the most appropriate database. So, I would really want to encourage you to think, what level of detail is needed at that fundraising database–CRM level, versus what level of detail is really required for accountability and transparency, as it relates to your accounting function.

**Melissa Cameron:** I know that this can really feel like a lot. As you think about, “What is this ecosystem? What does it mean for me? Do I need to employ that tool or another?” I really want to encourage you all to actually just begin by mapping out what your current ecosystem is, and begin to identify what points feel like they could be improved with increased efficiency, automation, or technology. And as you continue to seek out these technologies, I really want you to, really would love to encourage you to focus on the data structures and how they may or may not speak to each other and be mirrored across, because ideally there is a continuation of this data in all of these systems that can really allow you to cross-walk between who your donors are, how much they've given, and begin to make plans for future individual giving campaigns, and ultimately success.

**Melissa Cameron:** And of course, as we're thinking about ecosystems, I do want to dig into this idea of a CRM a little bit more. CRMs are incredibly comprehensive. They've really grown in just even recent history, and it can be a great tool for managing your patron and donor experiences. But I can imagine, just sitting here in an audience on a webinar, you might really be wondering, how do I start to even narrow down the field of CRMs, just based on what is out there in potential? And so, again, I want to just think through, what is the why behind the CRM that you might be thinking about employing? CRMs generally have about three different types associated with them. Some CRMs may have one or more of these qualities and characteristics, but also, just depending on who you are and what your organizational needs are, you may find yourself wanting to really identify with one area specifically over the others, so that you can then start to kind of think through which system is best.

**Melissa Cameron:** So, the first characteristic would be that of a collaborative CRM, which really allows for your donor data to be tracked across your organization. This is really great if you have an all-in, kind of hands-on approach to donor management. So, maybe you've got folks on a variety of teams who are really engaging with individual donors at any given point, and it's helpful to have a single system of record for everyone to be able to review and update in real time.

**Melissa Cameron:** The second type of characteristic would be that of an operational CRM. And this is really going to be most effective for those organizations who have high volume of activities. So, this could be a high level of donors, a high level of transactions, or even a high level of campaigns that you're attempting to assess and kind of try out over the year. An operational CRM is really going to automate those simple recurring processes. It's most effective if you've got what may be a linear process that’s more “A, B, and C” of every single donor: “First, they get an email, then they make a donation, then we send them an acknowledgement letter, and then we follow up with an end of year appeal.” So, thinking through, do I want something that's really going to streamline our internal operations? Or do I want something where there's going to be a lot of different players? Or perhaps a little bit of both?

**Melissa Cameron:** And then the final characteristic that you might consider can sometimes be a little bit more expensive, a little bit more costly. But that is the analytical CRM, and analytical CRMs are really consolidating just a lot of data that is both internal to your organization but may also come as an external information. And it's consolidating that in generating real-time, user-friendly reports that can inform your decision-making. One caveat about the analytical CRM is that sometimes it can require a little bit of a higher-level end user, and so you may really need an in-house expert in order to be fully able to adopt and implement an analytical CRM as a productive tool within your fundraising function.

**Melissa Cameron:** So, when you're thinking about, what kind of CRM do we want, what are those characteristics that we need, we also want to think about, just what is that field of technology? What are all of those CRMs that are available? And again, a good Google search will do you wonders. But I do also want to just lift up a resource which we found, which is this website called G2, and essentially what G2 has done is they've taken user feedback from a variety of fundraising software, which really goes all the way up to the full CRM, completely integrated, to maybe some more one-off, ad hoc components that might just be one or more of those bubbles in that ecosystem. And so, when you're looking at this, this is going to help you maybe understand, is the system that I'm looking at, is it a little bit more niche? That might mean that I have issues figuring out how to optimize it, or maybe they won't give us as many security updates over time. Or is it a leader in the field, which might mean that it's slightly more costly, or perhaps more robust?

**Melissa Cameron:** So we have included the link here on this page, and I want to just encourage you to go ahead and start reviewing for yourself, based on the ecosystem that you have, the business model that you are trying to support, as well as the type of characteristics, and, really, what strengths you want your CRM to have, thinking through all of those and then bringing those in before you start actually trying to identify the system selection. I can say, from my experience, I started a system selection really knowing which CRM we wanted to move forward with. But then we didn't take a time to pause and reflect back to see if we had staff alignment around what type of CRM we wanted. We didn't take time to pause and reflect on how many of those additional softwares would need to be employed just in order to fully make use of the CRM. And so, it's just a really critical step to stop and think through “what are your needs” before starting to actually pin down the most appropriate system for you.

**Melissa Cameron:** Of course, we cannot talk about fundraising technology without at least mentioning AI. Well, this is in many ways still emerging. I think it's really clear that we're starting to see the very significant trends in how AI can reshape how nonprofits are thinking about their most critical resource, which is their staff time. And so, we're seeing AI really come to light, or really being used, in the fundraising space specific to individual giving because it offers opportunities for increasing efficiency when it comes to crafting communications. We're seeing AI being used to develop the first draft of written emails that feel highly personal, or create images to sell tickets to your gala, etc. I do just really want to heavily emphasize that AI only be used to draft the communications; it should not be the final stop. Of course there needs to be human engagement and involvement as you're thinking through how best to employ that technology.

We're seeing more robust AI systems that can actually start to identify donor connections as well. So, this is happening a little bit more in the education space, but, for instance, you can say, “Hey, here are all of our alumni. And now where are they, out in the world? And how can we then bring that information back into our system to better connect and better leverage those connections?”

**Melissa Cameron:** And then, of course, automating engagement. We're really seeing automation happening all over the place in a tremendous number of ways. And a really effective tool is going back to, how can you start to operationalize and automate those really linear processes that are kind of A-to-C and that help minimize any potential for losing track of a donor or start… It helps to increase the overall collaboration efforts of your organization, as well as just make everyone feel as though they're a part of the process together—no one gets left out, so to speak.

**Melissa Cameron:** So, these are just a few considerations that we've thought about as you think about the ecosystem of your software and technology for your fundraising platform. Hilda, I'd love to pass it back to you for just some additional considerations.

**Hilda Polanco**: Thank you. Thank you, Melissa, for that ecosystem overview. I want to also remind us that technology is first and foremost a tool, and so, when you are making those, whether it's the selection of the CRM, the connectivity to the different platforms that Melissa spoke of… we want to think about it in the context of a technology implementation plan. So, the first aspect of that is understanding the connectivity. I've heard lots of examples where the development team is really in love with this one particular app for a particular function, and we go with that app, not really thinking about, how will that connect to the other systems the ecosystem that Melissa walked us through? And so, from a connectivity place, as you're thinking about the whole ecosystem of software, what are the integrations that possibly exist? We hear often clients coming to us to say, “We're on this software. What integrates with that?” It's almost like the first question that's being asked. And while that shouldn't be the final answer, it's really a place to start. Where have the bridges been built already? And how can we maximize bridges that have been built?

**Hilda Polanco:** There's also the structure. Again, how can we design the structure and the migration of the data to be such that it actually allows us to move forward with full maximum use of those options? Security: As you might imagine, with everything else in the in the sector, we're taking care of program data, we're taking care of our financial data. The security over our donor data is first and foremost a priority. So, how are we going to ensure that, as we think about the cybersecurity challenges that every organization is facing? I had one CFO say that he felt that his budget variances were death by a thousand licenses. And as awful as that sounds, his point was: The point of entry today into a lot of these modules are just a couple hundred dollars a month, or just $50 a month. But when we multiply that by the number of users, by the number of years, so really pricing out the total cost of ownership…. Historically, it was the entry point that was very expensive; now, I believe, it's just more thinking about subscription as a service and how that gets calculated. What are the processing fees? What are the annual and monthly fees? And what is the return on investment in any aspect of these investments, from the search engine optimization, which is a little bit outside of the technology, to the actual licensing costs?

**Hilda Polanco:** And then, lastly, what is the ability that you have for in-house maximization? I have also seen a trend in software providers giving very-low-cost licenses to nonprofits. But that's not forever. And so, we want to understand that if we are taking on a software package, we understand the cost, and we understand the level of customization. I know some of our guests today might address some of the technology that they've been using, and a key to success is certainly having the human element that's going to help us make the most of that software.

**Hilda Polanco:** So, again, this section on technology was a direct result of so many questions coming in from the field about, “How do I think about it? Is this the right vendor?” And it's very hard for us to endorse one vendor over another. It's much better for us to give you a framework. And again, the beauty of the Commons is that [as] more questions come up around software, more opportunities will exist to share knowledge.

**Hilda Polanco:** I now would like to sort of transition to almost like the most exciting part of the program, which is really connecting back to the strategy with donors and the levers of success in connecting with the donor and building that long-term relationship. So, the platform goes to Dana now, who's going to talk about that value proposition of individual donors specifically. Back to you, Dana.

**Dana Britto (she/her), Nonprofit Financial Commons:** Thanks so much, Hilda, and thank you, everyone, for tuning in today and being here. As Hilda mentioned, before we hand it off and hear the stories from our amazing two case presenters today, we really just wanted to revisit some of the key themes that we had talked about during our prior session on individual giving back on January 17th [2024]. And some of these themes you'll hear in some way, and will emerge in some ways, in the stories that you're about to hear in a bit. But I think one of the biggest things that we emphasized during last webinar, and I think Ruth brought it up a little bit at the top of today's presentation, is that individual giving is… it's really a source that is very uniquely suited and exclusively for the nonprofit sector. It is also something that for the most part is fairly unrestricted, and in that way, it's… again, it can be, and can serve as, some very critical, flexible funds for organizations. I think, when you think about the concentration of major donations that Ruth was talking about, obviously, the larger the percentage those donations represent in relation to your budget, there are some risks as it relates to sustainability that obviously need to be thought about. But, generally speaking, it is a source of very much needed unrestricted funds throughout the sector.

**Dana Britto:** I think the bigger theme that we really focused on in our first webinar on this topic was the fact that individual giving is absolutely a way to almost return to the roots of the sector in the sense that it represents an incredible form of regenerative capital. Right? Donors are, can be, organizational participants; participants can become donors. And in that way—and I think this again will come across a lot in the stories that you're about to hear—really prioritizing relationships, and building and cultivating those relationships, is a huge piece of building and being able to sustain successful individual giving programs. And I think—again, assuming that you're building a culture and systems around it—building that social contract and being in common cause with your constituents is something that isn't necessarily mission-dependent. It’s something that community development groups can do. It's something that arts and culture groups can do. It's something that environmental advocacy groups can do. But it's really about, again, building that social contract and being in common cause with your constituents and your stakeholders.

**Dana Britto:** And then, I think, the third piece and the third bucket that we talked about is, again, not just being in protection of and building that social contract, but also being very careful to make sure that you understand what that social contract is, what that common cause is that you and your constituents are building, and making sure not to betray that social contract. We talked about our case study with Komen, and the consequences of violating that social contract. So again, I think a really big theme here—and again, one that I think will come across in some of the stories that you're about to hear—is really making sure that you understand the regenerative nature of this capital, and the fact that it can come from many different places, and also the importance of making sure that you understand the community organizing aspect of this, and making sure that there isn't a line between donors and supporters, and that really making sure that you're doing whatever you can to recognize and respect the regenerative nature of this capital. Next slide, please.

**Dana Britto:** So, another big aspect, or big theme, that we talked about… along with some of the trends that Ruth presented at the top of the conversation, we also talked about what's going on, or what has been going on, for the better part of the past two decades. And so, what you're seeing on this screen is a slide that our colleague Laura MacDonald presented. And you're seeing in that bluish-green bar, while amounts given are going up, the number of households, that are represented in that yellow line, are going down. So, the number of people are going down, but dollars are going up. And so, I think, in the stories that you're about to hear, given this trend that we're seeing, I think it only further highlights the importance of really investing in people and relationships and really being able to see how you can really maximize and be in solidarity with those who are not just supporters of your group from a financial perspective, but actually represent supporters and tools through which you're advancing your mission as well. So, it's really highlighting the importance of the people aspect of this work, and investing in relationships more than ever, regardless of what's happening in the external world. But I think because of what's happening in the external world, really focusing on those relationships becomes that much more critical in building a culture and a capacity around individual giving.

**Dana Britto:** So, with that I will hand it off to Hilda.

**Hilda Polanco:** Thank you, Dana. Thank you so much, and so now I'm looking forward to the next part of the program, which is really a conversation, or series of conversations, with our leaders from the field, as we refer to them. And so, again, I'm going to begin my fireside chat with Cree and Lauren from the Native Governance Center, and then Dana will take over and engage in a conversation with Ari.

**Hilda Polanco:** I am going to stop sharing, because this is not about slides; this is about what we want to learn from our guests. And so, my first question is a framing question: Can you give us a little bit of background on the organization's history, its history with the development of your individual giving, and how you have come to prioritize it the way that you do?

**Lauren Kramer (she/her), Native Governance Center:** Cree, do you want to give us an overview of our organization? And then I can talk about some of our resource development.

**Cree Rose Dueker, Native Governance Center:** Absolutely. Lauren has been with NGC for a bit longer than I can, so she's great at a lot of that background and organizational history. But for those of you who haven't worked with us before, Native Governance Center is pretty unique in the work we do and how we do it. Our mission is that we assist Native Nations in strengthening their governance systems and capacity to exercise their sovereignty. We have a small but very mighty staff of 10 of us. We're all working remotely, so we're based in different areas, but mainly we're tuning in from our service region, which is Minnesota, North Dakota, and South Dakota. So, we work primarily with Native Nations sharing geography with those states, and then we do some national programming as well. Our annual budget is around $2.7 million, and we kind of fill this really exciting niche of being focused on indigenous-led systems change, so really long-term work, indigenous governance solutions. And again, that specific focus on just governance and sovereignty. And I'll turn it over to Lauren to tell us a bit more.

**Lauren Kramer:** Yeah, thanks. That was great. Hey, everyone. My name is Lauren. I use she/her pronouns. I'm the External and Donor Relations Officer, and I have the great privilege of working with Cree on our grassroots individual giving. In terms of our history with resource generation and our plan for that, our organization started out with a single very generous funder with a history of working in our region, specifically funding indigenous-led change. That was a huge gift, and continues to be a gift for our organization, but we almost immediately concluded that we needed to branch out, to both other institutional funders and also new types of funding. So, we have been on that journey since we opened our doors in 2016 to really diversify what we're doing and employ creative strategies to try to make that happen. And it's really starting to pay off for us.

**Lauren Kramer:** In addition to pursuing other regional funders, we have… our revenue generation plan is really driven by visibility. That has really helped us find success in bringing in donors who want to help take action to support our mission and then end up giving through a variety of channels. So, we have an individual giving program, sponsorships, earned revenue as our funding streams, and we use a lot of visibility tools, such as digital resources, events, trainings, and even a community committee of folks who are just excited about our mission and want to find ways to connect further, to bring in new donors. So hopefully, Hilda, that's a good start to launch some additional questions.

**Hilda Polanco:** Thank you, Lauren. We have seen so many histories like the one you describe, where you begin with one foundation or two and then are looking for that diversification. When we hear boards and leaders say, “We're gonna diversify our revenue,” our thought is always, “And do we have the skills and the sort of the mental framework for these new sources?” And so, I would love to understand a little bit more around the philosophy and the core beliefs that you and your team have with regard to constituent involvement, with regard to stakeholder engagement, and how does that inform your interaction with your donors? I'll leave it up to you to decide who's going to respond.

**Cree Rose Dueker:** Yeah, I can start us out, and then hopefully Lauren can maybe fill in anything that I missed. But what I really enjoy about this work in, like, Lauren and I's role, is that we really believe our stakeholders are gonna be co-conspirators with us throughout this process and throughout the work that we do. And so that's something. I think, that's very different than maybe other orgs. And so, our donors, because of that relationship that we've built, are really looking for ways to be more involved and looking for ways to help our mission and kind of further that along.

**Cree Rose Dueker:** And so we, in turn, really do look for and share ways with donors so that they can have these concrete action steps where they feel like they're furthering our mission and supporting tribal sovereignty, regardless of their own identity or backgrounds. We also really try to provide donors with ways they can recognize the emotional labor that we do in our job, through education and the free resources that we share. And we really encourage that to be donation, but also other ways they can contribute. And as time has gone on, we have been really fortunate with our donor base, to see more donors list our emotional labor and those free resources as a reason for supporting us—so, I think that's always a cool thing to share—in our donation comments online. So, if your platform has a donation comments section, make sure that you're checking those from time to time.

**Cree Rose Dueker:** I think a good example is that in 2013—or, sorry, 2023. My goodness! Full decade back. In 2023, for Give to the Max Day, we offered instructions for donors, and actually made a whole toolkit for donors that we sent out, that offered them instructions and examples of how they could support beyond just a monetary donation. It included things like being a social media ambassador, being a content creator, or a peer-to-peer fundraiser designer. And so that had a lot of donors following up with us and getting connected that way.

**Cree Rose Dueker:** And we really do just encourage donors at all times to engage with our content, whether that's commenting on a video and sharing their thoughts or contributing to a case study for our Beyond Land Acknowledgement series. There's just a lot of ways our donors choose to get involved. And last year, as well, with that toolkit—that was an idea that came to us through our community committee that Lauren mentioned. So that's another great way that we were able to take what donors were telling us they wanted to see and put it in action and engage in that reciprocal relationship again. And, Lauren, if I missed anything? Please feel free to jump in.

**Lauren Kramer:** Oh, that was great! I'll leave it there, so we have time to get through all the questions, but perfect.

**Hilda Polanco:** Thank you. Thank you. Thank you both. And, so, there's certainly a notion of traditional fundraising, and things you must do to be successful, and that's a little bit of passed-down generations’ opinions of individuals. I would love to understand, are there any notions in what we call “traditional fundraising” that you may have just rejected or re-envisioned in your path to really developing the relationship that you're seeking with your donors?

**Lauren Kramer:** Yeah, I think this is a really great question. I think, in fundraising circles, I've noticed more and more conversations around this topic, so it's really positive to see. A couple of ways we can answer this, I think. We don't soften any of our messaging for our donors or tell different groups of donors different things about our objectives. We're very upfront about the fact that we're unapologetically using a systems-change framework rooted in indigenous-led change. Every donor knows that, is on board with our key strategies. So that's really important.

**Lauren Kramer:** I think we have really centered community-centric fundraising principles and how we interact with our donors. For instance, we really recognize the value of every contribution and every donor, regardless of their level. During our campaigns, we make sure that every donor gets a phone call. (It's possible for us as a small organization.) But we really do value the chance to connect with our donors and hear why they're passionate about taking action in line with our mission. We also really try to appeal to younger donors and have steered away from some tools that to us feel a little stale, like a fancy gala or a fundraising event, and we focus more on video content and these helpful resources. We actually have even received a $50,000 donor-advised fund gift from a millennial donor who was brought in through some of our video content and resources. So that's been really cool to see. We've been trying new tools like peer-to-peer fundraising and this community committee that Cree was referring to, really kind of opening it up to anyone, making sure that we are in touch with the average donor to figure out what changes they'd like to see in our programming.

**Lauren Kramer:** I think maybe one of the biggest things is, we have really rejected this deficit-based narrative about indigenous people that some folks in the past have used or continue to use to fundraise, and instead, we really focus on community strengths and humor and joy. Cree, did I forget anything? Those are just some of the things initially that stood out.

**Cree Rose Dueker:** No, I think that's great. Just as Lauren said, we really try to reject maybe some of those traditional things and lead into our own values and community strengths.

**Hilda Polanco:** Thank you. Thank you both. And, as we hear your sort of suggestions of what's worked really well for you, we can definitely spot moments where I can see, “Oh, this is so relevant for other organizations,” and I think those on the call today are really thinking about, what are the key elements of success? And so, if you could just give us three pieces of advice for those on the call about how they should be thinking about developing their own donor database, or their own donor base overall, and just anything that you want them to take away.

**Lauren Kramer:** I mean, maybe we can… I can choose one, and then you can choose one. We'll do a little popcorn. So, I think the first key takeaway I would offer would be to really look for ways to build asks into your visibility efforts. So, think about, is there an opportunity to create a small donor ask. Are you hosting a free event? Maybe you have a voluntary donation option that you incorporate into your checkout page. Did you release a new resource, like we do? Prompt your audience to make that small donation to recognize the emotional labor that you invested. I think then you can obviously start cultivating these folks. But it's a really great way to bring people in initially.

**Cree Rose Dueker:** Yeah. And I believe one of the prior presenters said it, but looking for individual donors among your other funding streams has been something that we've seen a lot of success with. So, if you're like us, and maybe have an earned revenue program that you participate in, tapping into those folks. Maybe you have a corporate sponsorship program. Or, just looking at other ways to convert folks from these other streams into your donor stream and really getting creative with that. And, specifically for us, again, that earned revenue piece has been key in bringing in new donors for NGC.

**Lauren Kramer:** Yeah. And I can choose a final one. You know, I think, going back to what we said in terms of turning away from some maybe more traditional tactics, we really look to center asset-based language, stories, and narrative change. And I think that's just been very powerful for our donors, so I highly recommend others incorporate that as well. I think we really try to engage our donors in helping strengthen and uplift the communities we serve, rather than, like, fixing problems. And really, just try to avoid that deficit-based language. I think if you set this strengths-based tone from the beginning, that's best-case scenario, just to ensure that all of your donors are on the same page. I've heard of organizations maybe starting with something different and then trying to turn toward this type of language, and it can be difficult to kind of explain to donors, but we've really started out strong with that and continued consistently.

**Hilda Polanco:** Beautiful, Lauren. Well, I'm keeping an eye on the chat, and the questions just keep coming, seeking advice from what you've all learned, and so we'll have a Q&A portion where we might be able to get to some of those questions. I'd like to now turn the mic to Dana and to Ari, and Dana, take it away.

**Dana Britto**: Fantastic. Thank you, Hilda. Thank you. Cree. Thank you, Lauren, for sharing your story. I have the very unique honor and privilege of speaking with Ari Solomon, who's the Director of Development at Jewish Voice for Peace. And so, maybe, before we get into, Ari, the story and the strategy around individual giving at your organization, can you tell us a little bit more about the organization and yourselves? What you do, your mission, your history, and how that might have influenced your strategy and approach around resource development and individual giving generation?

**Ari Solomon (they), Jewish Voice for Peace:** Yeah, absolutely, and so excited to be here. So Jewish voice, for peace is the largest progressive Jewish anti-Zionist organization in the world. We're organizing a grassroots, multiracial, cross-class and intergenerational movements of US Jews in solidarity with the Palestinian freedom struggle, guided by a vision of justice, equality, and dignity for all people. As an organization, we're a base-building organization, meaning our work is really housed in our local organizing bodies nationally. And we're based in the US. We have roughly 33 staff working remotely across the US in our organization. Last fiscal year, our income is around $4 million, and about 88% of it is from individuals. That percentage fluctuates year to year between 80% to 92% in any given year, but it is consistently around that 85% to 90% mark.

**Ari Solomon:** And our approach to fundraising, and our history with it as an organization, very much was codeveloped alongside our political organizing model, meaning that we really center relationships as the focal point between both our fundraising and our organizing, and that's really grown and expanded from its initial iteration but hasn't fundamentally changed in terms of our scope and our approach.

**Ari Solomon:** Most of our funding is likewise unrestricted funding, the overwhelming majority of it is, and really our funding model like came out of necessity. For a long time, it was incredibly challenging to find foundations who would fund Palestine-related work. We have been seeing that shifting in recent years, so I do want to name that, and that's been largely due to incredible and intentional effort by many funders, many foundations and donors alike.

**Ari Solomon:** And at the same time, we've maintained our primary source of funding from individuals for three key reasons. Namely, that it makes us accountable to our base, not to outside funders, so we're directly accountable to our members, to the folks who are engaged in the programmatic work of the organization itself. It keeps us politically independent and strategic, so our work comes before our fundraising, before development. And it keeps us flexible, so we can shift our programmatic work as we need to to respond to the politics, capacity, the needs of our community, because we don't have highly restricted funds because we are primarily accountable to our base.

**Ari Solomon:** I think the thing that that really strikes me a lot with our fundraising model is it's taken decades to cultivate. It started very much as a small group of folks in a living room making a list of people in their own lives who they could reach out to and talk to about this work, and why it was important to them, and to ask for a contribution, and it built from there. Then, the next conversation was, who could those donors reach out to in their life? And so on, and so on, and over time now has morphed into the fundamental basis of our fundraising program. And of course, as we've grown, our tracking and management has evolved in that regard, with our fundraising really being solidified now. We have two

main fundraisers a year that we run in relationship with our grassroots fundraising network—our summer appeals and year-end appeals—where we individually reach out to roughly 20%, 25% of our entire donor base through direct one-to-one outreach, over phone, text, email, personal emails to them, and postcards. And that's run by 80 fundraisers—that's inclusive of staff, all staff, all board, and a team of member volunteers who join us campaign after campaign—to really build relationships for the long haul with our donor base and keep them both plugged into the work and keep the organization moving forward.

**Dana Britto:** Yeah. So, when we think about keeping the donor base plugged in, and you mentioned you’re a base-building organization with political organizing at the fore, can you talk a little bit more, expand maybe a little bit more, on any core beliefs or philosophies that your organization has around stakeholder engagement? How does that show up in interactions with donors, either on an individual level or maybe even a larger, more macro level?

**Ari Solomon:** So, it shows up… our fundraising model is very much the same as our programmatic, as our organizing model, in that organizing is relational. As an organizing, based-building organization, we approach our political work, our membership work, the same way we approach our fundraising work, which is that relationships are at the center. With all of our fundraisers, as they join campaigns, and with our donors, we put the person before the donor and really invest in that long-term relationship, not the one-time donation, which sometimes means that we don't ask for the donation and instead invest in in building the relationship, on really understanding who they are, why they came to this work, and why they continue to stay in the organization year over year. And then there's also… the other piece underlying a lot of this is building that trust and honesty with our donor base. We understand that our folks give to us because they trust us. They trust our vision. They're bought into the work. They understand how their contribution impacts the wider political work. And that comes out of having longstanding constant engagement and relationships.

**Ari Solomon:** And so, similarly with that, we spend an immense amount of time investing in donor cultivation and retention, which for us means the same thing as membership engagement and retention, and leadership development and identification, knowing that it's both not an option to default on other funding and, like, our donors need JVP for a political home as much as we need them to continue the work, and so we approach them as partners in in the work itself.

**Ari Solomon:** And I think the other thing that really comes to mind is we approach our fundraising and our relationships with donors with a sense of curiosity and investing in getting to really understand them, of why they give to JVP, when and how they give, and how they want us to reach out to them—do they want us to call them? do they want emails?—and really investing in a lot of that research to really have as much information as we can on our donor base so we can honor and respect and maintain the relationship with them.

**Ari Solomon:** And of course, when folks leave, especially when it's been a longtime donor, we ask them. We want to know what it is, how we can continue learning and growing and be in relationship and in partnership with them.

**Dana Britto:** Yeah. So, I'm hearing again a big emphasis on the importance of building those relationships, but also recognizing how this base is… they need JVP as much to be a political base as much as you need the financial support. So, given that, can you talk maybe a little bit more about the extent that JVP has had to, I guess, buck, or go against traditional notions in fundraising? What does that look like for the organization? And how is that come to play out and come to fruition in your approach to individual giving cultivation?

**Ari Solomon:** It's come out in kind of two separate buckets. First, in terms of donor-specific engagements, one thing we did away with feeling the need to have an overly thankful or overly positive messaging, or messaging that was really divorced from them as the individual, and really just instead leaning into a model that's transparent and honest. Our donors give to us because they understand their contributions as a political act, and they understand that sometimes the work that we do is rough, and that when we're up front about that, when we are creating opportunities to be angry with them, to be upset, to be hopeful, to be whatever it is… that goes a long way for building trust with them. So that sense of honesty and transparency.

**Ari Solomon:** And then the other thing with donors is the idea that we need to engage them specifically as donors only, that our donor base is somehow separate from our membership base, that is separate from our programmatic work. And so doing things that are, like, “only donor briefings.” We've stepped away from a lot of that, and instead focus on, how do we bring donors into the political work itself? How do we bring them into our leadership structures? How do we bring them into our communications, into our local organizing bodies? To really further that engagement, as our donors are partners with us in this work. Also, like, meaning that, in order to get involved in the work, that means we want to plug them into the leadership bodies. We want to plug them into all of the other opportunities. The donors don't shape the course of the work by the nature of being a donor alone.

**Ari Solomon:** We also step into a lot of this work with building relationships with our donors, through continuing that power mapping of their lists, of asking them, who else do you know who you could bring into the movement, and how can we support you to do that? Are there resources we can give you? Can we think through your networks as well? So, they can continue bringing in their networks, and it continually grows our donor base.

**Ari Solomon:** The other piece that really underpins a lot of this is building, maintaining a fundraising culture among staff, across the organization, across staff and board. And so, a few key pieces that I want to lift up of how we do that. On a staff level, every single time we are coming up to a fundraising campaign, we always take a step back to reapproach why we have this fundraising model, why we have the campaigns structured the way they are, to really remind, prepare, and honor the relationship. And a part of that goes with ensuring that staff—board and volunteers, all of our fundraisers—have the same donors on their list every single campaign. So, if they have 10 donors in their portfolio, they reach out to them in the winter and in the summer, and that list stays consistent to allow them the opportunity to build a deeper relationship.

**Ari Solomon:** Also on the staff level, we're pretty transparent and direct about why this matters, and where we're at, so we will often get into budget briefings and share the budget-to-actuals and share where we are in our fundraising so they actually understand how it impacts their work, and we make it relevant to them. So aside from being required as a part of the job at JVP, what do they actually stand to gain from their individual vantage point in the organization? Are they finding new leaders? Are they finding new activists or new artists? Who is it that we're identifying through our conversations with donors? And then making sure that they have donor lists that are relevant to their day-to-day work.

**Ari Solomon:** The other thing that we started doing internally is moving away from language of like general, mid, and major donor, and really just like using the identifications based on donors who give $5K+ plus or $1K, or give between $500 and $999, or whatever, which is a little wordier, but we found that removing that value assessment actually went a really far way to cultivating and maintaining that buy-in across staff of all of our donors, or anyone who gives a penny on upward. And we want to be building relationships with all of them, and that there's not some sort of internal value hierarchy among someone who gets $5 or $500 or $5,000, that we want to engage all of them equally as our partners.

**Dana Britto:** Yeah, I love this. Along with removing the value propositions, I love this emphasis on the transparency piece, not just as it relates to the interactions with your constituents, and your stakeholders, and your… potentially and eventually donors… but also as a way within your staff to making sure that they understand the impact on the budget. And I think it's a really key part of making sure that you're building a culture and involvement around fundraising as an organization. So, love that piece especially.

**Dana Britto:** Ari, thank you so much. Thank you for your transparency. Thank you for your openness, your honesty. I'm seeing a lot of reactions and questions coming up in the chat. So, with that, I want to hand it over to Mark and see if we can hear from some questions and address some questions from the audience.

**Mark Hager, Nonprofit Financial Commons:** Thank you, Dana, and hello, everybody. I'm Mark Hager. I'm one of the moderators at the Nonprofit Financial Commons, and I think our plan is to bring pretty much all of our presenters into the room at this point, and I've got about 15 minutes here where I can put some questions to the audience. Then we'll, at the end, we'll ask our two case presenters to come back and give us a few takeaways, so we can remember those before we head into our final last chat.

**Mark Hager:** As folks were registering, they sent us questions. As part of my preparation, I waded through all of those, broke them up into groups. And I've summarized my take on those questions over in the Nonprofit Financial Commons forums, which is prominently linked from our homepage. I've also just dropped a link into the chat. You can see what was on people's minds.

**Mark Hager:** It's not really our intent to try to cover all that ground, because those questions come from a variety of places, but we have covered a lot of that ground, and I'll post some of those questions now, as well. But those forums are a great place for you to go in and see what was on everybody else's mind, and to continue asking questions there. Put more questions there. Put answers there. Tell us what you want to talk about, because the forums are for that interaction. We'd love to see more and more of that going on there now.

**Mark Hager:** So, there's a variety of folks we got in the room. Nice to see you all. I want to go all the way back to Ruth's presentation, where she was going through the various questions that folks had. Ruth, you commented that the number of individual donors has decreased over time. Dana, you presented a slide that actually showed historically that decline in donors over time. But that really begs the question: Why? What's been going on the last couple of decades? And maybe you don't have a scientific answer for that. I want to pose that to both Ruth and Dana, but maybe others in the room have some thoughts about why have Americans been less inclined to give on average over the last several decades. Ruth, any thoughts on that?

**Ruth McCambridge:** Well, you know, there are a lot of speculations about all of that, and I mean, where I would tend to go with it is that I actually do, to some extent, see the nonprofit sector as being a little bit at fault. They don't use those muscles to engage people in building bases of common cause as much as you used to have to. That's where the roots of the sector is, and in democratic action, and I think, sometimes, with the professionalization of the sector, some of the other funding sources, we’ve forgotten how incredibly important taking that development of a group who has a passionate common cause is. For democracy, for our organizations, for the way people feel about their agency in in life. So, I think it's part of a larger problem in civil society. And it's one that I think we all have a real responsibility to address in everything we do.

**Ruth McCambridge:** Which is why this—you know, we know that that the way both of these organizations do their work, yes, does produce stable donor and growing donor bases. But it also does its bit towards producing a healthy, healthy, and inclusive democracy. And that's a beautiful thing. So. Dana?

**Mark Hager:** Thanks for that. Dana, that chart you presented was striking. That decline in that number of donors that have given over time. What might be going on?

**Dana Britto:** Yeah. And I think, when we talked about that trend a couple of weeks ago, I think Laura MacDonald was great in highlighting the fact that, yes, there's probably some factors like the economic environment and changes in tax law that are influencing that downward trend. But I think, to Ruth's point, I think there's—and she mentioned this, and presented—there's also the dynamic of, there is very much a concentration of wealth that is happening that I think also needs to be acknowledged, in that I think not taking advantage of this opportunity to, again return to, and we heard this a lot in the stories about… your participants and your constituents are not just a potential source of dollar donations, but they're actually advancing your work, and should be seen as players and constituents and advancing your work as well, and that social capital, sort of regenerative nature of this individual giving, I think, is something that maybe is underestimated somewhat. But again, I think there's external factors that I'm sure are influencing this. The concentration of wealth is huge. We have got a lot of reactions around donor-advised funds and how, again, especially when you're thinking of those massive gifts, there's a lot happening there, on the foundation and donor-advised funds, and that, I think, is influencing it. But again, I think part of it, too, is returning to our roots as a sector, and really investing in making, building a culture of fundraising that extends beyond just one development director and not thinking that you're going to succeed, or have all your entire resource generation strategy, succeed on the shoulders of one person.

**Mark Hager:** Good. Okay, thank you. Any of our other presenters have a quick thought about why we’ve seen a decline in likelihood of giving over time?

**Mark Hager:** Anybody else want that? Nobody else with a burning answer? All right.

**Mark Hager:** Let's move on to the next presentation, which was Hilda and Melissa talking about technology and donor management software. Certainly, a number of questions that came in from registrants had to do with systems and software. It was five or six of the various questions, and it was an important topic—and a nice presentation.

**Mark Hager:** Let me give a heads-up to Ari; after I get a chance for Hilda and Melissa to chime in here, I'd love to hear more about how JVP has engaged its technology, its donor management software. But before I turn to you, Hilda and Melissa, as we have to do, your presentation was sort of a one-size-fits-all as regards the size of the organization. But so many of the questions that people are asking the forums are about, “How can our smaller organizations do fundraising? How can they possibly get the kinds of technology in order to compete with larger organizations?”

**Mark Hager:** One question that came from a registrant was, “At what point are you big enough? At what point do you really need to be considering adopting these kinds of technologies? A particular CRM, or particular donor management software.” How much does size matter here? Melissa?

**Hilda Polanco:** Melissa, would you like to jump in?

**Melissa Cameron:** Sure. I can start, because I think when we're thinking about size, it's easy to maybe jump to, well, what is the appropriate budget size, or what is the volume of donations? And it really is about that transaction volume. So, if you start to see that your donations, or your individual giving campaign, is starting to increase to such an extent that it's taking your staff's capacity and time to manage it, that’s when you might want to start looking at some of those technologies to help increase those efficiencies and start to just reinvest in freeing up staff time and freeing up that resource to focus on other areas. So, especially if you're on the smaller side of an organization who maybe is just using Excel right now, I would encourage you to think about that ecosystem that we showed, and just start by identifying where you’re spending the most amount of time in your individual giving process and in your fundraising program. Is it about cultivating those relationships? Is it trying to steward folks through the giving process? Is there an extra step in terms of making a donation and then receiving an acknowledgement? So, just start to think through that entire ecosystem, where are those pain points currently showing themselves, and then maybe approach it from just kind of that openness and creativity into exploring what systems might be able to support one or more of those areas.

**Ruth McCambridge:** Mark, I'd love to hear from Cree and Lauren and Ari about this, because I feel like they have that experience of hitting those points, and when you realize you need something, or you need something different, in terms of technology, etc. Could you talk to that stuff a little bit?

**Mark Hager:** Well, let's turn to Ari. I don't want to cut off Hilda, but Ari, why don’t you go ahead and bring your example back here about adoption of CRM or other donor management software.

**Ari Solomon:** Yeah. Happy to share a little bit about ours. So, I think it was about six, maybe seven years ago or so, we switched over our CRM to EveryAction (now Bonterra), which was an investment for the organization, certainly, at the time. But it's really been such a foundational tool for all of our work. It hosts our email program, our action alerts, our member engagement, our donor management, our grant management, and having all of that data really housed in one place has been absolutely critical in informing the way that we build segments, that we engage with donors. It allows us to have a better insight of who's taking action but hasn't yet donated. We found it far more useful than some of the other donor-prospecting tools that might give us a topline idea of someone's giving capacity but not necessarily their buy-in or engagement to the programmatic work. And so, I found that in particular to be huge.

**Ari Solomon:** With our fundraising campaigns, because we have so many volunteer fundraisers joining us, we still use Google Spreadsheets for “Here's your donor portfolio of 10 folks,” or whatever it may be. And then, at the end of campaigns, all of that information gets uploaded back into our CRM to ensure that we're getting as much information and retaining as much information on our base as possible. And, then two of the other pieces that we switched to more recently that have been really effective for text banking and phone banking is Scale To Win, as both having integration and being really easy platforms to train folks on, making it as easy as possible for volunteer fundraisers to come in, get trained, and start having conversations with fellow members.

**Mark Hager:** Ari, remind me; how do you describe the size of your organization?

**Ari Solomon:** So, we have about roughly a $4 million budget.

**Mark Hager:** Are there things you would do if you were $10 million? Are there access to CRMs or features that you would do if you were bigger?

**Ari Solomon:** I think a lot of it comes from… so right now, we have two full-time staff folks who specifically manage data—one within fundraising, one who's more holistic. And I really think a lot of the work would be expanding out, and managing the existing donor base that we have, and better utilizing the features that we have within our current system. It's like, a little bit, where we use everything, and with thousands upon thousands of individual donors, it’s just a massive amount of data, all of the time. And so really, having more folks who are thinking through, strategically, how do we organize it? How do we build upon it? How do we grow? But certainly, every action has made it significantly easier to manage all of that data, especially across departments and across tactics and campaigns.

**Mark Hager:** Okay, thank you. Let me shift gears, back up, give Lauren and Cree a chance to talk a little bit more about their operations. I want to return to the biggest, or the most common questions that we had come at us, which had to do generally with fundraising strategy. Can you talk a bit about what traditional fundraising notions you might have rejected or had to re-envision to build and retain the kinds of relationships you want with your donors?

**Lauren Kramer:** We can, yes. I do think we touched on this a little bit during the panel. But was there something specific about that narrative that you were hoping to dig into further?

**Mark Hager:** I guess not, not specifically; there’s kinds of things you certainly adopt over time. But, given the kind of fundraising that you do, and your audience, what kinds of things do you not do? And why?

**Lauren Kramer:** Sure, yeah. So, I think we are very aware of the need to take calculated risks when it comes to our campaign themes and strategies, so rather than going for a safe, neutral campaign, we're always excited to really get out there with fun themes that are really attention-grabbing, and even go so far as to involve our executive director sometimes in a challenge at the end of the campaign. We've actually had the challenges ranging from him jumping into a freezing cold stock tank on his ranch to our coworker this year eating… I think it was like 10 oysters. We have a lot of folks on our staff who are not super into that. So, we really just try to engage our donors in humor and avoid making things just kind of what folks expect to see.

**Lauren Kramer:** And also, again, as we mentioned before, steering away from some of those more formal, calculated events to more of a decentralized model where we have more frequent campaigns that revolve more around the content generation and education rather than getting folks to show up once a year and donate. Cree, do you think that added something to what we showed before? Do you have anything else you want to add?

**Cree Rose Dueker:** Yeah, I think just one other thing that we maybe didn't touch on a ton before is that we also really challenge donors if they want to become content creators as well. So that's something that we encourage via a toolkit. But one of our campaigns, I believe it was 2022, was all about rez dogs. So, we had folks submitting photos of their dogs, and a little story about why they appreciate their dog, why they appreciate sovereignty, things like that. So, it doesn't have to be, as Lauren said, cut and dry; we try to have a lot of fun with our campaigns, too.

**Mark Hager:** Okay, I appreciate that elaboration. Thank you.

**Mark Hager:** I have a couple of questions I'd like to ask, but I'm not going to ask them. I was hoping we could get the panelists to talk a little bit more about AI, given that that has come up. But the question on people's minds is about how much impact’s it going to have on the world. The question that keeps coming up has to do with donor-advised funds—and I have some curiosity about how our cases do or do not consider the donor-advised fund money that's locked up. But we don't have time to get down those roads. Instead, I am going to invite our two, or I guess three, case presenters to stay here and re-summarize some of the takeaways they have here before we move into our final stages. So first, let's start with the Native Governance Center. What are some key takeaways here?

**Lauren Kramer:** Our key takeaways are centering asset-based language and stories in all fundraising activities. We kind of talked a bit about that one, so maybe we'll touch more on the second one, which is build your donor pool through visibility. This is really our key strategy when it comes to fundraising. We've used it as a tool to build our donor pool, because we basically started from scratch when we opened our doors in 2016 and needed to find a base of sustainable supporters to fund our work. So, we have used mechanisms like free public events that are virtual, our resources library, our strong social media presence, earned media opportunities, our presentation series that’s kind of like a fee for service for organizations to enter into. So that is what's really helped us build this pool over time. We talked about building our asks into our visibility efforts. Cree mentioned looking for individual donors in our other funding streams, so really getting creative by seeing if there are folks in one stream that could maybe become an individual donor. Cree, do you want to take it from there and finish us out?

**Cree Rose Dueker:** Absolutely. And then our final one here is just implementing strong systems from the start, and I think this goes back to what folks were saying a bit earlier, but it's a lot easier to begin your fundraising efforts when you have these really strong data systems already in place rather than trying to implement them later on and kind of catch up with your data. And that means that switching databases can also be kind of painful. So just trying to avoid that whenever possible, looking for a system that's gonna fit your organization's needs. If it has bridges to other systems or things that you use, that is really, really wonderful. But just being thoughtful and having a lot of intention when you are setting up the data system from the start. And just to add, we are pretty fortunate at NGC, we've had the same tech person for a while, but we know that's not the case with every org. So, having a good transition between folks, too, if you're maybe seeing some staff turnover.

**Mark Hager:** Ari, what can you share from what we need to walk away from JVP?

**Ari Solomon:** Yeah, absolutely. So, the first two, being very deeply interconnected, are “person before the donation” and “regular engagement is key.” We know folks stay with us year over year because we invest in getting to know them as a person, first, as a partner in in this work. And, likewise, relationships take time. We know that in order to invest in any type of relationship, it’s going to take a minute to actually grow it. So, when someone doesn't pick up the phone right away or respond to us right away, that’s fine, it’s okay, it's normal. I tell fundraisers this all of the time, every campaign. It can take a few months. It can take a few cycles to really start getting a deeper response from a donor. And that's okay. That's a part of the work of relationship building, of understanding who is a part of this movement and why they chose to work with JVP.

**Ari Solomon:** The other thing is, be specific about impact. Donors give because they care about the work that we're doing. They're invested in our political vision. They're invested in the organizing work itself. And we make asks in that context, so they understand how their contribution is actually impacting. The overall work is actually moving the organizing forward.

**Ari Solomon:** The last two also feel very related. You need a team. Our fundraising model would not at all be possible if it was staff only, and it certainly would not be possible if it was development only. Really, our approach requires all hands on deck, across all staff, all board members. And, we have about 25, 30-plus volunteers who join us for every single campaign, and we're constantly recruiting and getting more fundraisers, and that is both a huge undertaking and absolutely critical to not be doing this work alone.

**Ari Solomon:** And then the last piece is “data management systems matter,” both in terms of… For fundraisers, it's important that they understand why it's important to take notes and why it's important to track data, and being very clear and building that into the actual work of building relationships with donors themselves, and taking the time to train them on the data work. We consistently hear that the biggest obstacle that folks have to joining us on fundraising campaigns is learning the data management systems, which doesn't mean that we can't teach it, or that we shouldn't invest the time, but really thinking through, what are the resources, what are the ways that we can train folks on how to effectively manage and track data? And it's important for our donor relationships that we have good data management practices, so they have a felt sense of engagement. So, if they mention a big life event that happened while we were in a conversation with them, we want to be able to save that and reference it the next time we talk to them. Which means, of course, ensuring that those notes are getting back into our CRM and then going back into any future donor cultivation that we might have with them.

**Mark Hager:** Thank you, Ari, and my thanks to all the panelists, I'll now hand off to Amanda Nelson from the nonprofit financial commons who will wrap us up.

**Nonprofit Financial Commons:** Thank you, Mark, and thank you to our guest presenters, Lauren, Cree, and Ari, for those highlights and the key takeaways and sharing those valuable insights with our audience. I'd also like to thank our other presenters, Hilda, Ruth, Dana, and Melissa.