

2024 FUNDRAISING SUPPORT INITIATIVE EVALUATION

An External Evaluation of the Pilot Year

Rubayi Estes, Principal, Estrat Solutions

MSC
Movement Strategy Center

Cover and back cover photos of Oakland street art by David Wheat, @wheatception
Cover art by Aik Brown, aikbrown.com; back cover art by Bay Area Mural Program, thebamp.org
More on Estrat Solutions at estratsolutions.com

Table of Contents

Purpose of the Evaluation 1
- Innovation in Social Investment 1

Evaluation Methodology 2
- Type of Evaluation 2
- Initial Key Performance Indicators 3

About Movement Strategy Center 3

About the Fundraising Support Initiative 4
- Timeline and Phases 5
- Fundraising Support Initiative — Design Workshops 5
- Types of Support 7

Evaluation Findings 7
- Trends in Fiscal Sponsorship 7
- Table of Findings and Recommendations 9
- Summary of Findings 13

Future Learning 14

APPENDICES 15

APPENDIX A: Learning Questions 16

APPENDIX B: Fiscally Sponsored Project — Fundraising Readiness Assessment 18

APPENDIX C: Evaluation Survey 19

APPENDIX D: Snapshot of Pilot Program KPI Outcomes 20

Purpose of the Evaluation

This report presents the evaluation findings from Movement Strategy Center's (MSC) Fundraising Support Initiative (FSI). This pilot program aims to enhance the fundraising capacity of social justice organizations, henceforth known as "Projects," that are fiscally sponsored by MSC. Estrat Solutions, a strategic learning firm focused on uplifting marginalized voices, partnered with MSC to conduct a summative evaluation for the first year of the FSI.

The FSI aims to equip social justice organizations with the tools and resources to secure funding and scale their impact. This evaluation assessed the initiative using the following learning questions:

1. What are the preliminary results of the program intervention?
2. Did the co-creation of the program meet its intended purpose?
3. What role, if any, does this initiative have in MSC's broader organizational strategy?

The insights gathered from this evaluation will help shape the future direction of the FSI. Additionally, this report will provide insights into the broader social justice sector by highlighting effective strategies and critical elements for enhancing fundraising capacity among grassroots organizations with representation from historically marginalized communities.

Following this introduction, the report delves into the evaluation plan and the who, what, and how of the FSI. Finally, the findings are grouped by key topic areas with recommendations and a summary.

Why Fiscal Sponsorship for Social Change

According to a report from Social Impact Commons and the National Network of Fiscal Sponsors, fiscal sponsorship is a rapidly growing part of the nonprofit world.[1] This organizational model has seen a surge in demand since 2020 and has emerged as a vital framework for coordinating charitable efforts. This trend was amplified by recent global challenges, such as the COVID-19 pandemic and health inequity, movements for gender and racial justice, and various other urgent local and national issues — all of which disproportionately impact historically marginalized communities. Participatory governance of organizations promotes social justice by establishing methodologies that are representative of marginalized voices, such as decentralizing decision making to local levels and rewarding the mobilization of these groups.[2] Given the systemic barriers that limit BIPOC-led organizations' ability to secure unrestricted funding, build reserves, and maintain surpluses, the philanthropic sector must take proactive steps to address these inequities. By investing in these organizations in ways that challenge traditional philanthropy and systemic injustice, we can help create a more equitable future.

The Projects are a response to the bureaucratic complexity of establishing and running a nonprofit and the increasing professionalization of the field. As such, fiscal sponsorship is evolving to provide more comprehensive support for Projects beyond basic back-office functions. The relationship offers a streamlined approach, making it easier for individuals and organizations to collaborate and respond to these pressing needs. Fiscal sponsorships are being used to pool resources, incubate new ideas, and provide oversight to organizations that still need structural support. Most sponsors (73%) currently offer fundamental back-office services, including acting as a corporate home and providing finance, HR, legal, insurance, and compliance support. Additionally, many sponsors also provide crucial capacity-building resources (61%), professional development coaching (57%), and fundraising assistance (49%) to their Projects.[3]

INNOVATION IN SOCIAL INVESTMENT

The traditional fiscal sponsorship model is undergoing significant changes to better support social justice movements through several key innovations. Fiscal sponsors are increasingly incorporating community voices into funding decisions. Organizations like Social Impact Commons are pioneering models that allow sponsored projects to have direct input into organizational governance. This shift in power dynamics ensures that resources are allocated based on community-identified needs, rather than through top-down decision making.

Additionally, the funding landscape has expanded beyond traditional grant distributions to include flexible capital deployment. This includes rapid response funding for urgent social justice needs, recoverable grants that can be reinvested in other projects, and hybrid funding models that combine donations with impact investments. Pooled funds have also proven effective in reducing the administrative burdens on individual projects. Technology has played a crucial role in this evolution, with digital platforms streamlining back office operations and improving reporting systems that better capture social impact metrics. MSC, a nationwide organization in the United States, has been collaborating both online and in person, has a broad geographic reach, and has invested in financial management software and other technologies to enhance transparency and learning in fund flows.

Fiscal sponsors actively advocate for policy and systems change. They support projects aimed at structural change

[1] Fiscal Sponsorship Is On the Rise, Allowing Groups That Aren't Nonprofits to Accept Donations. The Chronicle of Philanthropy. By Eden Stiffman. November 27, 2023. The report indicates that growth in the field has been larger than in the past 50 years, with a significant surge in demand for fiscal sponsors since 2020. In fact, 71% of survey respondents reported an increase in demand for their services during the pandemic, leading many to experience growing pains.

[2] "Participation, Representation, and Social Justice: Using Participatory Governance to Transform Representative Democracy", Polity, 44(4), 666-682.

[3] Social Impact Commons. (2023, November). Fiscal Sponsor Field Scan 2023 Survey Report. Retrieved from https://www.socialimpactcommons.org/fiscal-sponsor-field-scan-2023.

and work to build networks and coalitions among the projects they sponsor. By analyzing data from various projects, they can identify systemic issues and develop improved methods for capturing and sharing insights. At the start of the FSI, MSC conducted a comprehensive financial analysis across projects, measuring growth and trends in fundraising and development strategies.

Since 2021, MSC has taken a strategic approach by introducing initiatives that complement one another. One such initiative is the Beloved Communities Network, which serves as an incubator and learning space for movement leaders striving to transform society from systems of violence and extraction into communities built on care, love, and regeneration. Through specialized gatherings known as Transitions Labs, they bring together individuals to deeply explore and develop practices for social transformation; each "Beloved Community Lab" is uniquely adapted to its specific context, with the participants working toward building collective power for systemic change.

Movement infrastructure funds are designed to provide long-term, unrestricted funding for social movement infrastructure, focusing on organizing, leadership development, and coalition building. These funds emphasize multi-year commitments to enable strategic planning, rather than just launching initiatives.

Rapid response funds are intended for quick funding of urgent needs and opportunities, such as protests and crisis response, and feature streamlined applications and reporting. Often managed by intermediaries like the Urgent Action Fund and Common Counsel Foundation, these funds facilitate timely support.

To advance social justice, power-building funds concentrate on community organizing, advocacy, civic engagement, and leadership development, encompassing both 501(c)3 and 501(c)4 elements. Integrated capital funds combine various financial tools such as grants, loans, and technical assistance for comprehensive support. Reparative funds aim to address historical inequities through wealth transfer components, including the return of land or assets, as exemplified by the Native Land Conservancy.

This diverse array of funding mechanisms provides fiscal sponsors with multiple pathways to advance social justice and shift power to historically marginalized populations.

Evaluation Methodology

TYPE OF EVALUATION

Estrat Solutions used a mixed methods approach, enhancing existing indicators with developmental evaluation learning questions through focus groups, interviews, and a review of relevant literature.

We identified three methodologies and selected relevant measures from each to assess the individual experience, impact on their Projects, and opportunities to grab intended or unintended significant changes at MSC that furthered the intended objectives of the FSI.

1. Individual Assessment using "Transactions-Translations-Transformations: Metrics That Matter for Building, Scaling, and Funding Social Movements."[4]
2. Marguerite Casey Foundation Organizational Capacity Assessment Tool,[5] a diagnostic learning tool and self-assessment instrument that helps nonprofits identify capacity strengths and challenges and establish capacity-building goals.
    A. Preliminary elements identified include, but are not limited to, Funding Model (3.07), Fund Development Planning (3.08), and Fundraising (4.03).
3. Most Significant Change: The components of the Most Significant Change evaluation method are well suited for social justice organizing, as they align with resource generation, malleability, adaptation, and skill development. This evaluation offers the ability to identify crucial touchpoints, milestones, and pivots; and to conduct a process evaluation, such as the effectiveness of the readiness assessment and intervention strategy.
    A. Due to the project's recent conclusion, select outcomes (such as funds raised) will take time to come to fruition. Therefore, the additional measures should be incorporated in future surveys for the FSI pilot cohort and others.

Using insights from the discovery phase of the evaluation, we developed learning questions that encompass existing measures and generate new inquiries to inform the overarching research questions (Appendix A):

1. What are the preliminary results of the program intervention?
2. Did the co-creation of the program meet its intended purpose?
3. What role, if any, does this initiative have in MSC's broader organizational strategy?

[4] Transactions-Translations-Transformations: Metrics that Matter for Building, Scaling, and Funding Social Movements (2011) by Manuel Pastor, Jennifer Ito, and Rachel Rosner.

[5] The Marguerite Casey Foundation Organizational Capacity Assessment Tool is a derivative product of the Capacity Assessment Grid created by McKinsey and Company for Venture Philanthropy Partners (www.vppartners.org) and published in Effective Capacity Building in Nonprofit Organizations (2001). It was modified, reorganized, and assembled in electronic format for the Marguerite Casey Foundation (www.caseygrants.org) by Blueprint Research & Design, Inc. (www.blueprintrd.com) and is used with permission from Venture Philanthropy Partners.

Initial Key Performance Indicators

MSC, as part of its co-design, derived **Key Performance Indicators (KPIs) (Figure 1)**. These KPIs were shaped and revised through insights from a co-designed process, including internal and external workshops, surveys, and readiness assessments. The following section elaborates on these activities.

Three surveys with questions geared by the KPIs were administered (Appendix B) during the period of consulting with the Projects: One at the start of the initiative to inform the baseline, one mid-implementation, and one upon completion. It should be noted that an initial financial review and a readiness assessment also created the baseline. We share more on these practices later in the section.

The learning questions in Appendix A distribute these KPIs across the three questions noted above and add the additional measures that can be attained by using different methods. For this study, we employed participants, staff, stakeholder, and non-participant interviews and focus groups. A literature review was also performed to contextualize the work within the landscape of fiscal sponsorship in the United States. Appendix D includes a snapshot of survey outcomes.

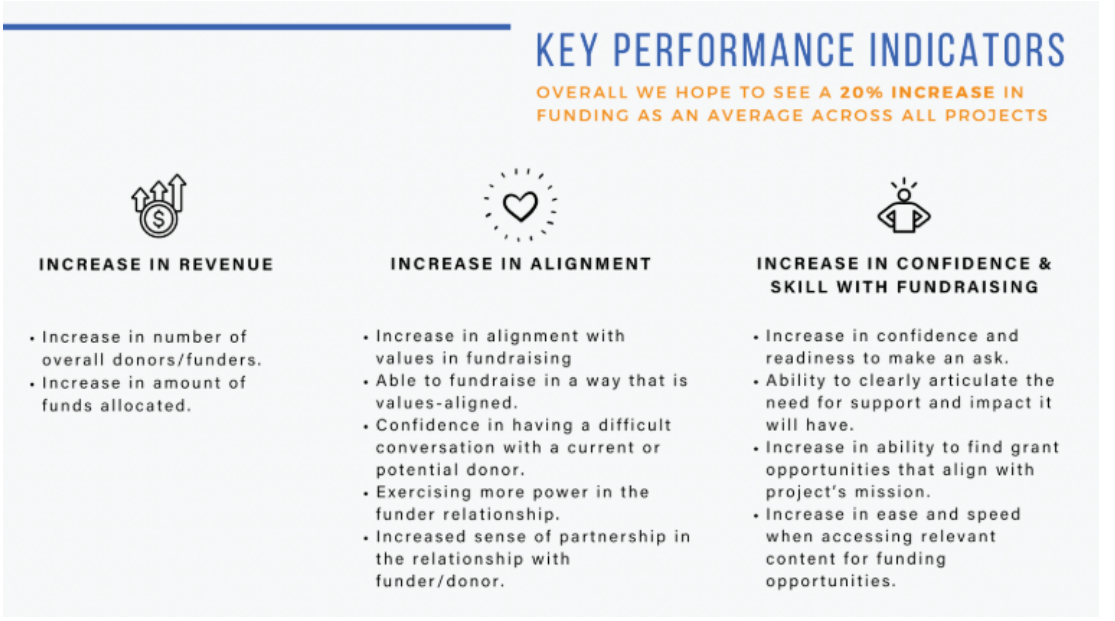


Figure 1: KPIs were developed by the Fundraising Task Force.

Recommendations in this evaluation includes the analysis of current and past research, such as the:

1. Readiness assessments and surveys delivered by MSC staff to Projects with initial program KPIs
2. Interviews, focus groups, and literature review conducted by Estrat Solutions
3. "Movement Strategy Center: A Portfolio Review" conducted by Social Impact Commons
4. The Fundraising Task Force design stage needs and desired outcomes exercise (Miro)

About Movement Strategy Center

Movement Strategy Center (MSC) is a national nonprofit organization based in Oakland, California, dedicated to supporting and funding social justice organizations. MSC provides resources, fiscal sponsorship, strategic thought partnership, advocacy for philanthropic change, and capacity-building support to BIPOC, women, and LGBTQIA+ leaders working on social justice issues related to race, gender, and environmental equity. It champions radical interdependence, equity, justice, and innovation in its approach to social change. MSC's mission:

Movement Strategy Center is a movement support organization enabling access to crucial infrastructure, capacity building, and thought partnership for BIPOC, women, and LGBTQIA+ movement leaders, activists, and communities challenging intersectional issues of systemic racism, rampant environmental destruction, and crippling economic exploitation.

MSC is rooted in ecosystem strategy, which aims to advance transformative change by incubating and accelerating the work of its fiscally sponsored, movement building organizations.

MSC has experienced significant growth over the past three years, increasing in size, revenue, and complexity. While its portfolio has grown by over 30%, revenues and net assets have surged by approximately 80%. Spending amounts have remained relatively consistent, with a spending rate below 50% of the annual revenue. This indicates a strategic approach to resource allocation that emphasizes long-term sustainability. To speak to the abovementioned diversification and innovation in finances, **Figure 2** shows the distribution of the financial portfolio, while **Figure 3** shows the diversity in fiscal size of the Projects in MSC's portfolio.

MSC is at a pivotal stage in its evolution. Though this evaluation focused on a single initiative in the future, it will be essential to consider:

1. What the return on investment could be with a distributed portfolio (cumulative Project budgets),
2. How other MSC initiatives bolster the financial health of the Projects and, lastly,
3. What is the balance in increased resources, capital expenditure or human, to offer the necessary support for Projects to increase revenue, self-sufficiency in fundraising, and subsequently increase the revenue under management at MSC?

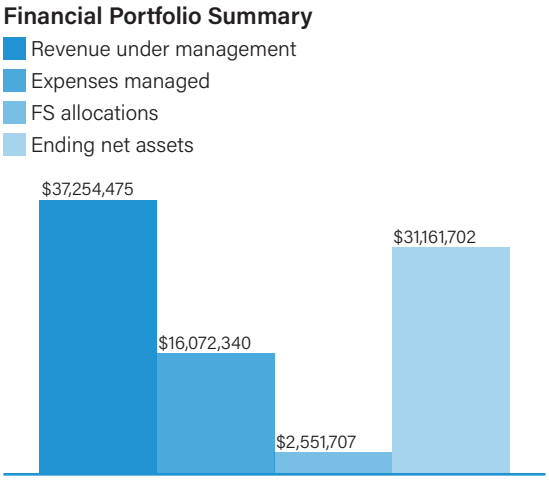


Figure 2: MSC financial snapshot.

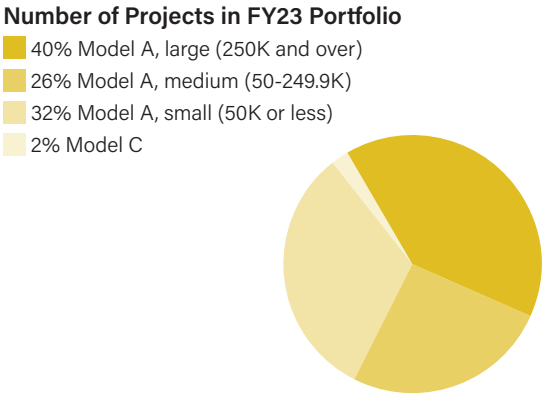


Figure 3: MSC Project portfolio; financial analysis provided by Social Impact Partner, 2024.

About the Fundraising Support Initiative

In 2022, MSC received a $75,000 grant from The Clarence E. Heller Charitable Foundation to develop "enhanced services," which was renewed in the same amount for the following two years. The grant was intended for infrastructure support, ultimately focusing on creating a program to support fundraising. In November of 2022, the Fundraising Task Force (FTF) was created as a cross-departmental team with representation from Fiscal Sponsorship, Development, Communications, Operations, and Design & Innovation to inform this process. To ensure a values-aligned approach, the FTF chose to pursue a co-design process.

Value alignment and co-design in social impact programs are deeply interconnected processes that strengthen program effectiveness and authenticity. Value alignment creates the foundation and ethical framework through which co-design can meaningfully occur, while co-design provides the practical methodology to ensure those values are genuinely reflected in program implementation. This effort was in addition to existing capacity-building workshops to enhance financial health, networking, and developing funder pitches. The design phase experienced interruptions due to organizational changes, competing priorities, social and civil unrest in the United States, and the start of the war in Gaza. A senior staff person, a trainer, and a design expert were brought on to collaborate and fuel this next stage of explicit design and innovation literacy, and to support the team in moving the work into its next phase.

Value setting is essential because it serves as a set of guiding principles that help establish boundaries when facing a tough decision. Values can also be aspirational and valuable when the outcome is uncertain, but certain elements are desired. For example, while Projects were unsure about the type of fundraising support they would like to receive, MSC was certain, through these inclusive processes, that they wanted any support to be grounded in race, equity, and social justice principles.

Value setting and KPI development are intrinsically connected because values define what truly matters to the Projects and the communities they serve. KPIs help translate these priorities into measurable indicators for tracking meaningful progress. When well aligned, they enable better storytelling, strategic decision making, and mission focus while demonstrating progress to stakeholders. The key is ensuring KPIs serve rather than drive the work by regularly revisiting values and metrics to align with Projects and community needs.

Value setting has proved to be a long-practiced method for MSC, which continuously aims to innovate the traditional fundraising approach by incorporating community-centric

Value Setting for Movement Strategy Center and its Fiscally Sponsored Projects

1. *Fundraising must be grounded in race, equity, and social justice.*
2. *The future can guide us; we are not constrained to the present or past.*
3. *Everything gets done through relationships, and nothing gets done without them.*
4. *We treat donors as partners.*
5. *Embodiment is crucial to ensure that we have access to all the capacities we need.*
6. *Commitment to practice and action.*

fundraising principles.

Authentic value alignment fundamentally requires building genuine relationships and trust — values are deeply personal, culturally informed, and shaped by lived experiences. Trying to align values without relationships often leads to superficial agreement rather than true shared understanding. At MSC, staff believe "everything gets done through relationships, and nothing gets done without them." As such, MSC leverages its **Project Advisors** (points of contact on staff for Fiscally Sponsored Projects) to communicate with, build feedback loops, and deepen relationships with Projects.

TIMELINE AND PHASES

The FTF shaped four phases of the pilot **(Figure 4)**. MSC had never engaged in a thoroughly intersectional process with a new cross-departmental team, which presented both challenges and advantages. Cross-departmental teams are incredibly valuable due to their members' diverse skill sets and backgrounds, and they foster essential buy-in to support new programs that draw on resources from various departments.

FUNDRAISING SUPPORT INITIATIVE

Design Arc

Co-design creates a dynamic feedback loop in which aligned values inform how co-design happens. The process reveals where values need further alignment, ultimately leading to more authentic and effective social impact programs. The sequence of co-design activities enabled MSC to:

- **Foster Dynamic Engagement:** By actively involving the Projects in the design process, staff created a more engaging and collaborative experience.
- **Leverage Existing Insights:** Building upon the insights they had already cultivated; using the FTF process as a foundation for further exploration and ideation.

Empathy Mapping: Laying the Groundwork

The FTF began immersing themselves in the world of the Projects through empathy mapping. This exercise allowed them to step into the Projects' shoes and understand their thoughts, feelings, and motivations. By collectively mapping out their experiences **(Figure 5)**, they gained a shared understanding of the Projects' challenges and desires.

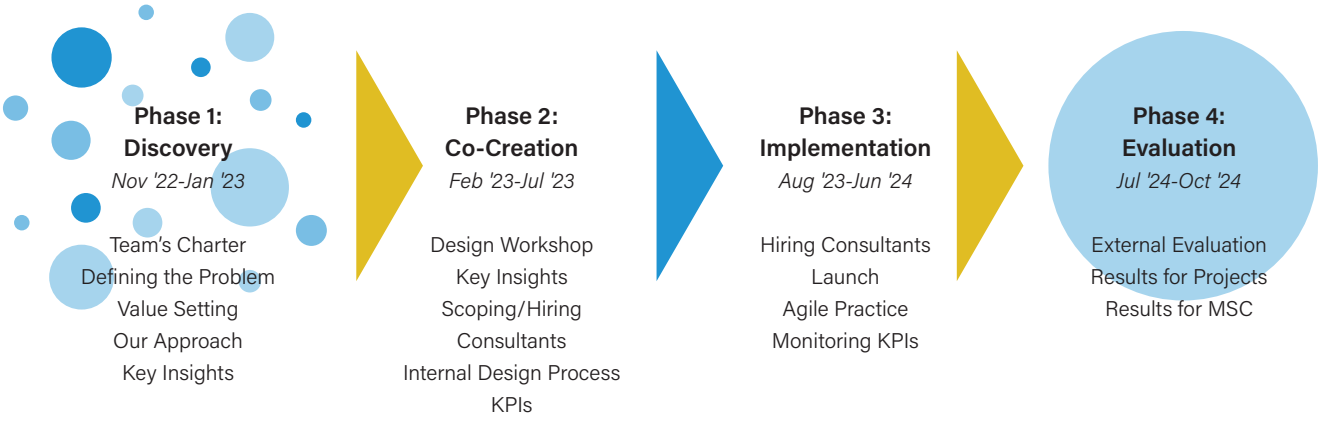
The **empathy mapping** exercise included two main questions:

- What impact will requesting participation in a focus group have on a project?
- What mechanisms would make participation more equitable and effective, so the data we collect comes from a representative sample and is authentic?

Surveying: Checking the Pulse

The FTF developed an online survey to gather initial preferences from Projects. The survey link was sent to Project Advisors, who had two weeks to gather feedback from their Projects. Project Advisors were encouraged to complete the survey alongside their Projects, enabling them to ask clarifying questions about the types of support being offered. This approach also allowed Project Advisors to collect additional feedback from the Projects that the survey may not have captured otherwise. Most (71%) of responding Projects requested contractor hours to acquire high-engagement supporters, particularly among Projects with fewer paid staff. At least 50% of Projects in most groups requested this support, except those with over 15 paid staff and those with revenue exceeding $1 million in fiscal year 2021-2022. Over half of the Projects also sought contractor hours for grant research and writing.

Figure 4: Fundraising Support Initiative and FTF Timeline.



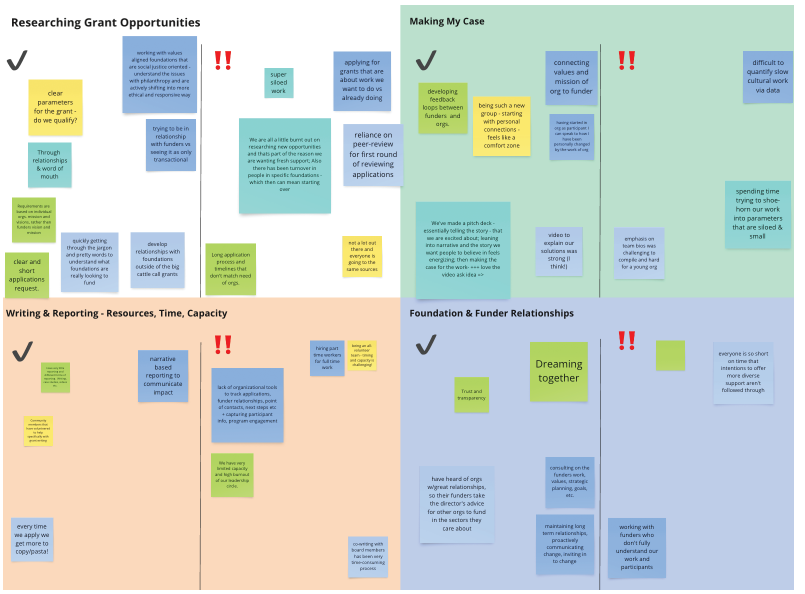


Figure 5: A Miro (virtual whiteboard) workspace.

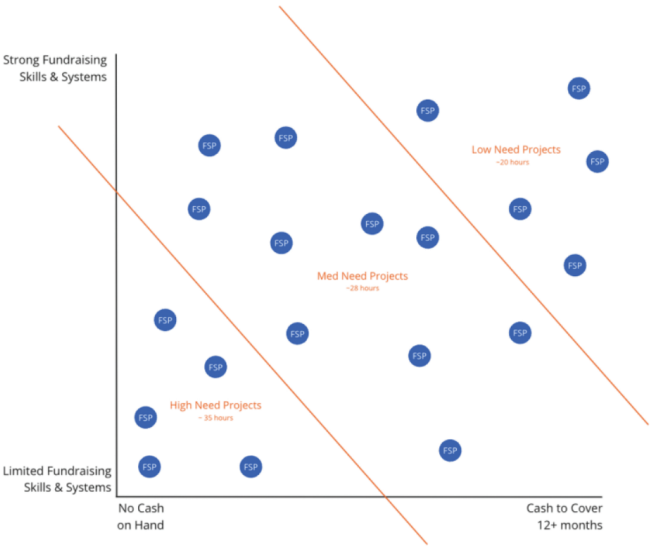


Figure 6: Readiness and Financial Need Plot Matrix.

Facilitated Sensemaking: Uncovering Insights and Opportunities

A facilitated sensemaking session was designed to delve deeper into the insights gleaned from their research. This collaborative discussion highlighted several key takeaways:

- A Strategic Void: Little emphasis was placed on strategic thinking. This presented a unique opportunity for us to take a bold stance and offer a fresh perspective.
- The Power of Interconnectedness: There was a strong desire and need to connect diverse Projects and initiatives. The identified Projects created opportunities for collaboration and proposed touchpoints during the pilot phase.
- Values-Driven Innovation: A clear theme emerged, indicating that the Projects sought innovative solutions deeply aligned with their values. They desired empowerment and a chance to transcend traditional constraints.

Informed by these valuable insights, the FTF strategically pivoted its approach to more deeply engage co-design methods through two participatory design workshops.

Co-Design Workshops: Defining Criteria

A "key tenet" of co-design, as described by John Chisholm, Senior Research Associate, Design Management, Lancaster University, "is that users, as 'experts' of their own experience, become central to the design process." Thus, as the FTF continued to demonstrate readiness, increasingly sophisticated co-design methods were introduced to center this initiative on MSC's values of radical interdependence and love. As a participatory approach to designing solutions, co-design enables community members to join the creative process as equal collaborators in making design decisions.

Two 90-minute virtual workshops were held utilizing a Miro (virtual whiteboard) workspace **(Figure 5)**. A total of 14 Projects participated, each receiving $200 in compensation. Through a series of sequenced processes, participants confirmed or challenged assumptions, refined definitions, and ultimately honed the criteria for the pilot. The workshops confirmed fundraising support would primarily be through consultant hours, with a unanimous desire for the allocation of hours to be equitably distributed based on need.

Assessing Readiness and Cohort Selection

Priority of need was based on two key metrics:

1. Fundraising readiness: Projects that indicated they had little fundraising experience, a small supporter base, or lacked ready-to-use pitch content would receive more support.
2. Financial health: Projects with fewer months of liquidity would also receive more support.

Projects were required to complete a readiness assessment to participate in the program. Of 39 Projects, 31 completed the assessment, with scores ranging from 22-47 and averaging 35. A perfect score would have been 59.
The readiness assessment is included in Appendix C. It was designed to explore readiness based on:

1. Understanding of organizational finances
2. Ability to communicate outcomes
3. Resource allocation and capacity
4. Sophistication of existing fundraising strategy
5. Interest in engaging

Financial health was measured by months of cash on hand (calculated as cash balance divided by budgeted monthly expenses). Projects ranged from having no cash reserves to over three years of runway. On average, Projects had just under a year of liquidity; five Projects had no cash on hand.

Project readiness scores were multiplied by the number of months of operating cash resulting in a need value. Projects in the high need category received a 30% larger contractor budget than those in the average need category, which in

turn received a 30% larger budget than those in the low need category.

The FTF grouped Projects into low, medium, or high need groups; and allocated our budget for contractor hours accordingly **(Figure 6)**.

- Projects assigned low, medium, or high need.
- Projects choose a track (grant writing or individual giving).
- Budgets finalized: Each need level translated to several available hours.
- Projects paired with a consultant.
- All hours had to be used by June 30.

Identifying Consultants

Identifying high-quality consultants was a large feat. A comprehensive job description was crafted based on Projects' needs and distributed to a wide network, resulting in 39 applications for review. The selection process was thorough and transparent. A rubric was developed to evaluate the resumes based on the outcomes of co-design workshops, with two members of the FTF responsible for this assessment. Additionally, two other team members conducted the interviews.

Consultant interview questions were tailored to reflect the insights from the workshops, focusing on values such as decolonization, philanthropy, and participants' concerns. We aimed to ensure the candidates' experiences aligned with the Projects' needs. Finally, the FTF held a meeting to make hiring decisions.

The FTF assigned each consultant a specific number of projects and conducted individual introductions to share the available budget and Project goals. At the mid-year point, the FTF readjusted certain Projects and reassigned them to other consultants based on specific needs and areas of expertise. The Projects were open to this process, and consultants benefitted from the pre-existing trust and rapport with MSC staff. The consultants and MSC staff moved into implementation in September 2023.

TYPES OF SUPPORT

Based on the participatory design process that took place during Phase 1 and Phase 2, the main structure of the program became an allocation of direct fundraising support via a set number of consultant hours. Projects were able to select one of two paths — either **grant writing support** or **individual donor engagement support**.

- Grant writing support: Offer comprehensive support for creating content and strategies to enhance the success of grant applications. This includes researching potential funding sources, crafting compelling narratives, and ensuring compliance with all submission guidelines. Consultant services also include assisting with writing and submitting final grant proposals, providing feedback, and revising to strengthen the application.
- Individual donor engagement support:[6] Identify and engage potential individual donors using personalized strategies that align with their interests and giving patterns. Guide donor stewardship to ensure that long-term relationships are nurtured and maintained. Additionally, assist in preparing and delivering compelling pitches and presentations that clearly communicate the value of the organization's mission and initiatives, ultimately encouraging contributions. Central to this initiative was the creation of individual giving campaigns targeting low-dollar donors through email marketing and social media, along with identifying potential funding sources.

The next section provides an overview of the evaluation findings, highlighting the program's successes and the factors that contributed to these achievements. It addresses the significance of the core strategies implemented and discusses the potential role of the FSI in MSC's current organizational development. The findings are structured by phases and drawn from the initial learning questions.

What are the preliminary results of the program intervention?

Did the co-creation of the program meet its intended purpose?

What role, if any, does this initiative have in MSC's broader organizational strategy?

Evaluation Findings

TRENDS IN FISCAL SPONSORSHIP

The fiscal sponsorship field is rapidly growing, with 73% of fiscally sponsored organizations or Projects formed after 2000. Medium-to-large, locally focused sponsors are leading this growth. Fiscal sponsors enable significant charitable work, collectively supporting over 12,000 Projects, stewarding over $2.6 billion in funding, and employing over 18,000 people. The field exhibits greater diversity than the nonprofit sector across racial, gender, sexual orientation, and disability identities **(Figure 7)**.

Most sponsors provide essential administrative support and capacity building services. Over half of the sponsors track the total costs associated with delivering their services; however, smaller sponsors often need help to recover these costs. The demand for sponsorship exceeds available capacity, leading

[6] MSC decided not to use the term "major gift" as a way to transition away from traditional philanthropy. Instead, they aim to assess the value of donor contributions by considering factors such as volunteer time, engagement and participation, advocacy, and alignment with their mission, in addition to monetary donations. The concept of community-centric fundraising emphasizes this approach. In the future, MSC plans to more explicitly support projects that focus on this understanding of value.

many sponsors to turn away Projects due to staffing constraints. Liquidity levels vary, with nearly half of the sponsors having less than three months' worth of cash on hand. While most sponsors use standard agreements and provide basic reporting for Projects, only some offer direct access to financial information.

Sponsors require increased investment to meet demand and enhance capacity. Consistent standards, data collection, and research are essential to understanding the field's evolution and impact. With sustainable investment, fiscal sponsorship can promote equity, efficiency, and resilience in the nonprofit sector.[7]

The 2024 edition of "11 Trends in Philanthropy" from the Dorothy A. Johnson Center for Philanthropy poses several questions rather than providing definitive answers. Each trend explores moral, economic, equity-related, tactical, and other issues that the philanthropic sector will need to grapple with in the coming years.

Key trends discussed include measuring success for higher education in prison programs beyond recidivism rates; the rise of Asian American and Pacific Islander philanthropy; the challenges facing Black women leaders on the "glass cliff;" the need for increased philanthropic investment in the U.S. South; the implications of new federal race and ethnicity data standards; the local impacts of the nationwide affordable housing crisis; the growing fiscal sponsorship model; the integration of Artificial Intelligence in philanthropy; debates around donor anonymity; the financial realities shaping Generation Z's philanthropic potential; and the influence of social media personalities on charitable giving.

While providing data and examples, the report emphasizes that the philanthropic sector must wrestle with these complex issues and find simpler solutions as it navigates an era of profound economic, demographic, and technological change.[8] This is an opportunity for fiscal sponsors to focus on

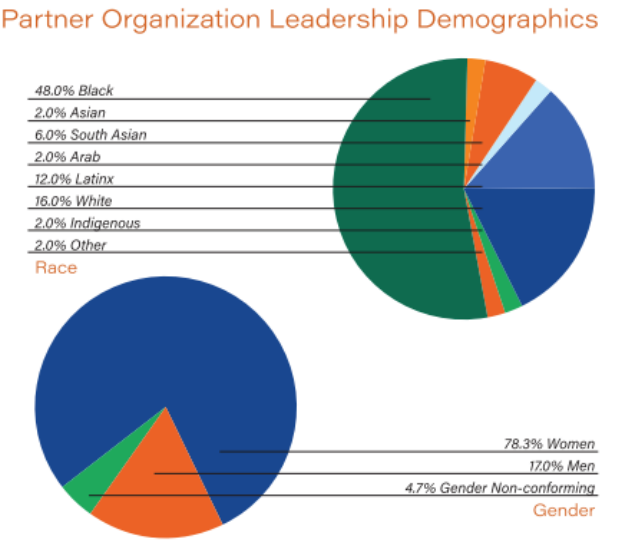


Figure 7: MSC's partner demographics per the 2023 annual report.

supporting representative leadership from historically marginalized communities working to advance social justice work.

MSC is grappling with the landscape of fiscal sponsorship, its tradition of financial innovation, the needs expressed by its Projects, and the socio-political climate. BIPOC leadership has observed a lack of sustained growth in philanthropic investments, contrary to the expectations set during the recent period of racial reckoning in the United States, the pronounced inequities in health outcomes during the global pandemic, and the increasing investments in U.S. proxy conflicts. The image below delineates specific trends in philanthropy on the left and articulates a "call to action" or recommendations for increased initiatives on the right.

[7] Social Impact Commons. (2023, November). Fiscal Sponsor Field Scan 2023 Survey Report. Retrieved from https://www.socialimpactcommons.org/fiscal-sponsor-field-scan-2023
[8] The Johnson Center for Philanthropy. (2023). 11 trends in philanthropy for 2023. Retrieved from https://johnsoncenter.org/blog/11-trends-in-philanthropy-for-2023/

In a Traditional Fiscal Sponsorship Model

- Inclusive practices move at the speed of trust. Collective capacity and design-thinking in movement building takes time, and is more sustainable with increased buy-in.
- Funders disproportionately fund "shovel-ready" projects, representative leadership in social justice work is disproportionately underfunded.
- Less than half of fiscal sponsors provide fundraising or marketing support to their projects (2023, Social Impact Commons).

Mitigating Gaps in Traditional Fundraising

+ *Increase community centric fundraising vs. donor-centric approach.*
+ *Leverage Subject Matter Experts (SMEs) in fundraising across the sector with peer-to-peer learning opportunities.*
+ *Scale funder advocacy for better understanding and change with individual and institutional donors to increase general operative support.*
+ *Support grassroot BIPOC non-shovel ready projects because race and class are still major barriers to accessing funds.*

TABLE OF FINDINGS AND RECOMMENDATIONS

We have outlined the pilot program's strengths across the ideation and evaluation phases, along with alternative implementation strategies in subsequent iterations. Research indicates that the phases should be maintained in their current form for the pilot program; however, it is possible that the implementation in the second year may prioritize certain phases over others.

	ACTIVITY | OUTPUT	OPPORTUNITIES
PHASE 1: DISCOVERY		
GRANT & DONOR RELATIONSHIP	▪ A successful grant was written and reported upon for two additional renewal grants of $75,000 each. Flexibility was an immense success.	▪ Program staff engagement in designing fundraising strategies and intermittent donor conversations can support setting expectations for outcomes. This reduces the risk of loss of continued funding or reporting inaccuracies and increases the opportunity for donor education and long-term buy-in.
FUNDRAISING TASK FORCE (FTF)	▪ Cross-departmental team building was invaluable. ▪ Increased demand for time from each department was challenging. ▪ Value centering was threaded through each phase of the program.	▪ Consistent vertical and horizontal communication on the project and status updates could increase willingness to spare staff time. ▪ Although Boards are not typically engaged in Projects, a pilot program that is intended to become integral to organizational output should have intermittent strategic discussion and buy-in at the governance level as well.
FINANCIAL INNOVATION IN SOCIAL JUSTICE	▪ Innovative business models: Fiscal sponsorship model that can leverage shared fundraising resources and skills. ▪ Capacity building: Offering financial education and technical assistance to help individuals and communities improve their financial wellbeing. ▪ Resource offset: Consultant coaching while generating collateral for the Project.	▪ Purpose-driven investments: Directing capital toward businesses and Projects prioritizing social and environmental impact. This is an opportunity to gather Projects for collaboration around issue areas, intersectionality, and Project capacity. ▪ Social impact bonds: Consider Donor Advised Fund investment in social programs with the expectation of a financial return tied to social outcomes.
PHASE II: CO-CREATION		
CO-DESIGN PROCESS	▪ Co-design methodology: This process established a foundation for success in delivering a relevant program with available resources. ▪ Surveys and virtual co-design workshops for informed and inclusive decision-making. ▪ Empathy mapping was well received.	▪ The intensive co-design process will not be necessary for the second iteration. However, a prioritization (compass) measurement and value-centering exercise are recommended for buy-in for future iterations of the initiative. ▪ The co-creation process should be clearly communicated to participants without making assumptions about

	ACTIVITY | OUTPUT	OPPORTUNITIES
PHASE II: CO-CREATION CONTINUED		
		outcomes. A timeline and regular follow-ups will help maintain buy-in and reinforce the feedback loop.
PROJECT ADVISORS	▪ Project Advisors are critical players in all phases, design, implementation, and evaluation. They have existing relationships and are trusted and appreciated by the Projects.	▪ If this initiative and framework continue, there will be value in creating a structured unit of Project Advisors with supervision that carries a lighter caseload, but has a bird's-eye view of all the capacity building and coaching activities.
VALUES PERCEPTION	▪ Participants felt the initiative was centered on shared MSC values and appreciated how it translated throughout their process and communication. ▪ Co-creation perception: Some participants felt their input was limited while a co-creation process was integrated.	▪ No new opportunities identified. Value centering at all stages was critical in the initiative development and should continue as is.
CONSULTING HOURS: TAILORING STRATEGIES TO INDIVIDUAL NEEDS	▪ Customized approach: The consultants recognized the need for a personalized coaching approach that would consider each Project's specific needs and goals. ▪ Focus on sustainability: The goal was to equip Projects with sustainable fundraising strategies, rather than relying on one-off grants. ▪ Resource reallocation: Unused consulting hours were donated to other Projects. This was an effective way to manage consultant hours across the cohort based on readiness and need.	▪ The continued commitment of staff time and resources to effectively manage and administer the program is vital for success. ▪ Offer fundraising consultant training on facilitating their first meeting with the Project.
PHASE III: IMPLEMENTATION		
CONSULTING: LEVERAGING TECHNOLOGY AND TOOLS	▪ Streamlining processes: Utilizing tools and templates can help Projects save time and increase efficiency. ▪ Data-driven decision making: Analyzing data can provide valuable insights for fundraising strategies.	▪ Information sharing across programs, such as a spreadsheet with potential donors and grant opportunities. ▪ Repository of tools shared or in peer-to-peer learning.

	ACTIVITY | OUTPUT	OPPORTUNITIES
PHASE III: IMPLEMENTATION CONTINUED		
BALANCING EXPECTATIONS AND CAPACITY	▪ Tight deadlines and KPI pressure: Some Projects and consultants felt the initial KPIs and timelines were ambitious, given the Projects' varying levels of readiness and capacity. ▪ Limited bandwidth: Many Projects struggled to balance fundraising efforts with their core missions, leading to time constraints and implementation challenges.	▪ Dedicating staff time and resources to effectively manage and administer the program is vital for success. ▪ Lack of dedicated staff and resources could lead to program failure. ▪ Build buffers for socio-political changes and unrest: All Projects advance social justice, which might shift Project priorities in real time.
THE ROLE OF EDUCATION AND EMPOWERMENT	▪ Knowledge sharing: Consultants provided training and guidance on fundraising techniques, such as grant writing, prospecting, and donor cultivation. ▪ Building confidence: Encouraging Projects to believe in their potential was essential for their long-term success.	▪ Co-creation of the program was seen as a step toward empowering Projects. ▪ Building trust with new consultants requires time. As an introductory activity, a paired session with consultants and Projects will ensure a common starting point, and an opportunity to share expectations and connect.
COMMUNICATION AND FEEDBACK LOOPS	▪ Expectations: Some participants felt the initiative's goals and expectations needed to be communicated more clearly. ▪ Peripheral support: To participate effectively, Projects needed more practical support, such as website development, marketing materials, and direct coaching. ▪ Limited flexibility: The initiative's structured approach, particularly the donor track, could not accommodate all participants' diverse needs.	▪ Increase peer-to-peer time for the Projects. This could be a gathering space to share resources, discuss, and receive feedback from peers in similar circumstances. ▪ Limited capacity: Many Projects face staff and resource limitations, making it challenging to allocate time for initiatives. Consider offering flexible implementation timelines and/or staggering project start dates to help them commit and secure funding. ▪ Maintain sufficient capacity for Project Advisors who sustain feedback loops and adjust support accordingly.
SYSTEMS CHANGE AND LONG-TERM SUSTAINABILITY	▪ The initiative explored "Community Centric Fundraising" principles, aiming for systemic change in philanthropy and fundraising. ▪ The focus on equitable resource distribution among Projects was highlighted as a vital aspect of systemic change.	▪ Continued commitment to an inclusive, equitable process is essential. ▪ Consistent Project support with clear goals and dedicated resources is critical for long-term impact. ▪ Long-term support: Participants emphasized the need for ongoing support, knowledge sharing, and collaboration beyond the initial

	ACTIVITY | OUTPUT	OPPORTUNITIES
PHASE III: IMPLEMENTATION CONTINUED		
		program. Multi-year and complex partnerships can take up 18-36 months to develop.
LOSS OF INSTITUTIONAL KNOWLEDGE	▪ Overall, the interview highlights the importance of collaboration, addressing systemic issues, and allocating resources effectively to ensure the long-term success of the FSI. ▪ Turnover of personnel with in-depth knowledge of Projects, MSC, and the FSI impacted program execution.	▪ Where possible, support smoother onboarding and staff transitions to avoid external impacts on Projects.
PHASE IV: EVALUATION		
EARLY REFLECTIONS	▪ The FTF, which is cross-departmental, conducted a research and needs assessment at an early stage.	▪ Early reflection, empathy exercise, and readiness assessment were influential in determining the elements of the initiatives that meet the needs. Continue to build on this work and identify what other inquiries would avoid pitfalls. ▪ Determine demands on FTF staff to prioritize across departments and report back to the funder(s).
READINESS ASSESSMENT AND OTHER SURVEYS	▪ Readiness assessment: This was given to gauge the financial capacity and determine whether the Project was low, medium, or high need. ▪ Response rates to KPI surveys were depleting over time. ▪ Increased fundraising capacity: Several participants reported success in raising funds and expanding their fundraising strategies. ▪ Shifting mindset: The initiative challenged participants to rethink traditional approaches and embrace new fundraising methods.	▪ Project Advisors could work on readiness and with the Projects individually to identify actual versus expressed needs in co-design to better inform consultant skills and scope. ▪ Make surveys an expectation of partnership and funding with an expectation of a manageable number administered each year. ▪ Reduce the KPI survey to a Likert scale of 5-7 to reduce subjective variance in selecting across the scale over time. Alternatively, if maintaining 10 points to select from, offer the previous scoring for the Project to determine whether they are better or worse off since the previous touchpoint.
IMPACT AND EXPANSION	▪ Increased fundraising capacity: Several participants reported success	▪ Expand the time period for revenue-focused KPIs to a minimum

	ACTIVITY | OUTPUT	OPPORTUNITIES
PHASE IV: EVALUATION CONTINUED		
	in raising funds and expanding their fundraising strategies. ▪ Shifting mindset: The initiative challenged participants to rethink traditional approaches and embrace new fundraising methods.	of 18 months and/or stagger start and end dates based on readiness. ▪ Consider Community-Centered Fundraising, but with an objective to increase collective assets for MSC. ▪ Embracing a more flexible approach based on individual project needs is crucial. ▪ Capture funder cultivation and other developmental metrics to demonstrate moving Projects along pathway indicators of building fundraising capacity.

INITIAL KEY PERFORMANCE INDICATORS

Fundraising Support Initiative: A Transformative Approach to Empowering Social Justice Organizations

Movement Strategy Center (MSC) launched a pilot program, the Fundraising Support Initiative (FSI), to empower fiscally sponsored social justice organizations. This initiative aimed to boost the Projects' fundraising capabilities and, ultimately, their impact. The summative evaluation identified preliminary results, assessed whether the inclusive design process contributed to achieving the initiative's intended objectives, and determined how it aligns with MSC's broader mission. Additionally, the evaluation process documented the iterative nature of the initiative.

The FSI positively impacted the participating organizations, as evidenced by the interviews, focus groups, and overall improvement in scores across most metrics. Participants gained confidence in their fundraising abilities, developed clearer strategies, and improved access to resources. They also strengthened their partnerships with funders and donors. However, there were some fluctuations in specific areas. For instance, participants initially felt confident in articulating their needs, but required additional support to refine their search for funding opportunities.

During this pilot year, the program demonstrated remarkable impact, helping participating Projects raise $1,947,500 in funding asks through 42 grant applications and four individual giving campaigns. Participants secured $250,000 in immediate funding, with the potential to raise an additional $1,585,000 from pending applications. Perhaps most impressively, these organizations collectively increased their cash intake by 8% and secured 110% of their budgeted revenues, a significant achievement in a challenging fundraising landscape.

The program's inclusive design approach was crucial to its effectiveness, with participants hailing the centering of values in MSC's programming. By providing tailored support that addressed unique challenges faced by BIPOC, women, and LGBTQIA+-led organizations, the initiative went beyond traditional fiscal sponsorship. The program focused on building fundraising capacity, creating content for Projects to solicit funds, expand relationships, and improve donor communication. Three notable opportunities arose during interviews and focus groups; while creating a supportive environment, there is also the opportunity for peer learning, aligning other MSC educational opportunities, and creating joint funding appeals.

The program's success stemmed from its collaborative and deeply intentional co-design approach. By focusing on the unique challenges faced by marginalized and BIPOC-led organizations, the FSI went beyond traditional fiscal sponsorship. Participants experienced substantial growth in fundraising confidence, developed clearer strategies, and improved their ability to connect with potential funders.

The key recommendations from this assessment include continued capacity building efforts, personalized coaching strategies, and long-term follow-up to ensure sustained growth and development of participants' fundraising skills.

So where does this all fit in the larger scheme of things? The FSI represents a pioneering fiscal sponsorship model that centers **MSC's values**. The FSI addresses critical systemic funding inequities facing social justice movements by directly supporting grassroots organizations in building collective power. The initiative provides a replicable framework that empowers small,

representative, community-driven organizations through its innovative approach, ultimately demonstrating MSC's deep commitment to equity-centered capacity building. This strategic model facilitates financial support and creates sustainable pathways for grassroots groups to amplify their impact and develop organizational resilience.

The FSI represents a strategic breakthrough for MSC in supporting social justice movements. The program embodies the organization's **core mission** of building collective power by providing grassroots organizations with the tools, confidence, and resources needed to advance social change. By piloting this innovative fiscal sponsorship model, MSC is doing more than providing financial support — it is fundamentally transforming how social justice organizations access and leverage financial resources.

Future Learning

Future learning and exploration questions are critical elements of a pilot program. They act as a guide for subsequent iterations and broader implementation. These questions assist in pinpointing areas for enhancement, reveal unexpected insights, and guide strategic decisions.

In this case, we focus on the impact of fiscal sponsors electing to offer deep capacity building support for fundraising, such as the Fundraising Support Initiative at MSC. What are the necessary learning questions in implementing this across the sector?

- By what criteria do we define equity? What is most effective for advancing a Just Transition and liberation?
- Is there an increase in grassroots organizations being resourced by traditional funders with increased visibility of incubation-type fiscal sponsorship?
- Are funders informing their scope and grant selection process after receiving applications from BIPOC, women, and LGBTQIA+-led Projects advancing social justice and policy advocacy?
- How are we sharing decision-making power with the people most impacted by our decisions? How are we accountable to greater movements? How are we centering the margins?
- Do funders understand the benefit of investing in incubation-style fiscal sponsorship?
- What are the implications of Artificial Intelligence (AI) in grantmaking and inequity in content available for machine learning? How might we ethically leverage AI to advance the impact of our mission and Projects?
- What is the financially feasible business model to strike the perfect balance of deep, accessible support and investment income to manage and grow operations for scale?

2024 FUNDRAISING SUPPORT INITIATIVE EVALUATION

APPENDICES

APPENDIX A: Learning Questions

This table outlines the measures we adopted or developed to answer the three main questions of the study: How do we assess preliminary outcomes, examine the effects of the design process, and evaluate mission alignment with the broader organization? The final measures should be determined after Movement Strategy Center (MSC) determines its strategic direction for the coming years.

All items highlighted in **green** represent current Key Performance Indicators (KPIs) that have been integrated into surveys for projects to respond to at the inception, midpoint, and conclusion of the Fundraising Support Initiative (FSI). The items highlighted in **blue** are additional KPIs that can be gathered through stakeholder interviews, focus groups, or literature reviews and should be incorporated for mid- and long-term outcomes.

For this initial evaluation, we distributed the questions across sources and tailored the interview, focus group, and research questions accordingly. These sources may change over time and can be adjusted to align with areas of expertise.

LEARNING QUESTIONS		KEY PERFORMANCE INDICATORS (KPIS)
1. What are the preliminary results of the program intervention?		
Program Effectiveness To what extent has the FSI increased the fundraising capacity of participating movement-building leaders, collaboratives, initiatives, and networks? How has the initiative contributed to participants' deepened financial and operational knowledge? Has the initiative effectively supported participants in expanding their mission's impact and role in systemic change?	**1**	Increase in Revenue
	1.1	Increase in the number of overall donors/funders.
	1.2	Increase in amounts of funds allocated.
	1.3	Expanded Project reach in priority funders.
	1.4	Enhanced capacity to deliver mission-critical activities.
Participant Outcomes How have participants' fundraising strategies and practices evolved as a result of the initiative? What specific skills and knowledge have participants gained through the program? How has the initiative impacted participants' ability to secure funding for their work? How has the initiative influenced participants' understanding of, and relationship to, philanthropy?	**2**	Increase in Alignment
	2.1	Able to fundraise in a way that is values-aligned.
	2.2	Increase in confidence and readiness to make an ask.
	2.3	Ability to clearly articulate the need for support and the impact it will have.
	2.4	Increase in ability to find grant opportunities that align with Projects' mission.
	2.5	Increase in ease and speed when accessing relevant content for funding opportunities.
	3	Increase In Confidence & Skill with Fundraising
	3.1	Confidence in having a difficult conversation with a current or potential donor.
	3.2	Exercising more power in the funder relationship.
	3.3	Increased sense of partnership in the relationship with a funder/donor.

LEARNING QUESTIONS CONTINUED

2. Did the co-creation of the program meet its intended purpose?

Movement Building Impact

How has the initiative contributed to strengthening the overall capacity of the movement ecosystem?

Has the initiative fostered collaboration and cross-pollination among participants and other movement actors?

How has the initiative advanced the goals of systemic change?

Program Design and Implementation

How effectively did the program design meet the diverse needs of participants?

Were the program's resources and support systems adequate for participants' success?

How effectively did the program balance individual and collective learning and support?

To what extent did the program create a safe and inclusive space for participants to learn and grow?

3. What role, if any, does this initiative have in MSC's broader organizational strategy?

MSC's Role

How effectively did MSC fulfill its role as a fiscal sponsor and movement support organization?

How did MSC's radical values and philosophies shape the program's design and implementation?

Sustainability

What factors contribute to the sustainability of the FSI?

How can the program generate additional revenue or reduce costs to MSC?

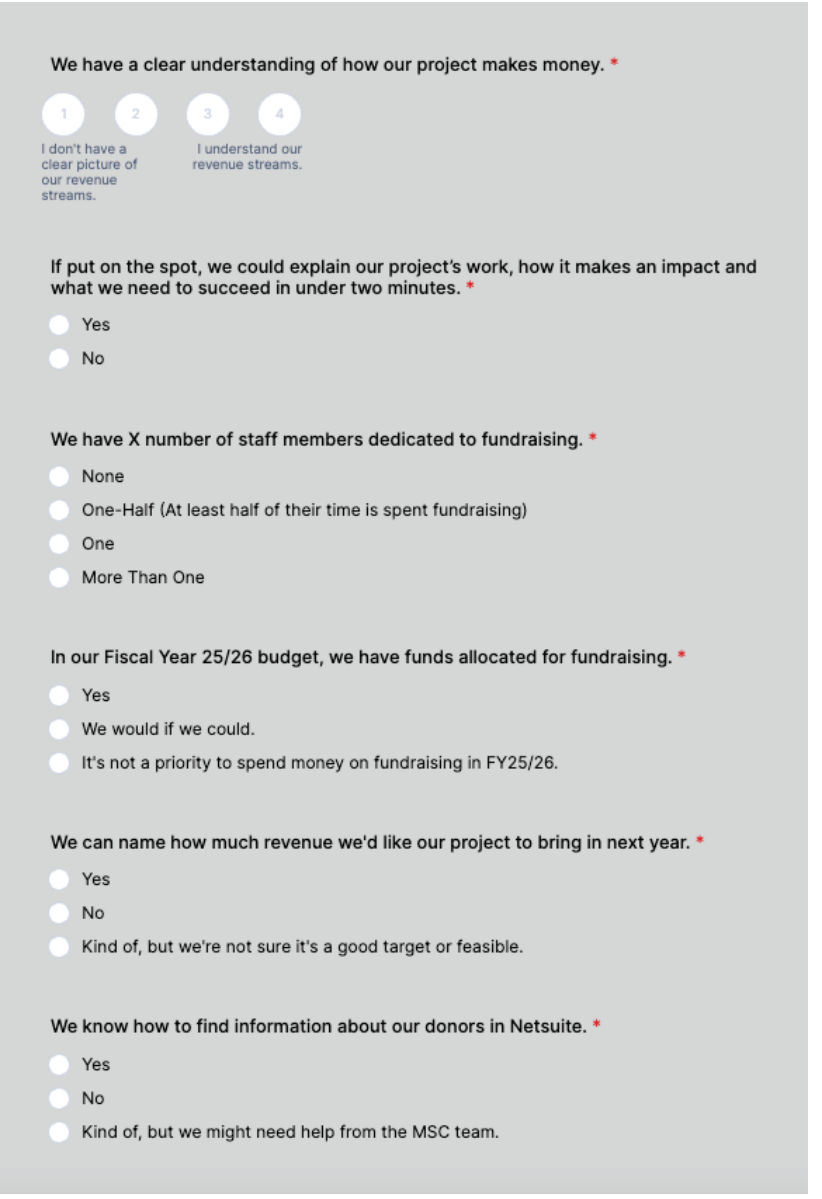
KEY PERFORMANCE INDICATORS (KPIS) CONTINUED

4	Strengthening the System
4.1	Increase in alignment with values in fundraising.
4.2	Cross-Sector Collaboration Effectiveness: ▪ Partnerships formed ▪ Joint fundraising strategies developed ▪ Cross-organizational training sessions
4.3	The percentage of participants in the FSI who identify as belonging to one or more of the following underrepresented groups: BIPOC, women, and/or LGBTQIA+.
5	Design Intention
5.1	Friction in collaboration with consultants.
5.2	The results of the co-creation process are relevant and align with the Projects' expressed fundraising needs.
5.3	The co-creation process led to unplanned but positive outcomes.
5.4	Participants' perception of the safety and inclusivity of the program environment.
6	MSC Role and Perception
6.1	The FSI successfully addressed the organization's expressed fundraising needs.
6.2	Improved perception of MSC's contribution to building a sustainable movement for fundraising equity and justice.
6.3	The initiative influenced participants' perceptions of MSC.
7	Sustainability
7.1	Strategies needed to sustain the impact of the FSI beyond the pilot phase.
7.2	Ripple effect of MSC's community-centered fundraising strategy to the broader movement for fundraising equity and justice.

APPENDIX B: Fiscally Sponsored Project — Fundraising Readiness Assessment

The readiness assessment was beautifully designed to gauge the Projects' current financial health and fundraising capacity and inform the direction they would like to take in this Fundraising Support Initiative (FSI). Based on interviews, focus groups, and process review, there are very few recommendations to incorporate into an early assessment of the cohort:

- Add questions to assess the fundraising intention to get a better understanding of the portfolio for fundraising. For example: What are the proportions between programmatic grants, capital campaigns, and operating support? What are your short-term and long-term fundraising goals? How would participation in this initiative help you achieve those goals?
- Request a simple organizational chart to discern whether the Project has a clear organizational structure with defined roles and responsibilities. The Project Advisors have much of this knowledge and can insert information on their behalf to reduce the burden. Still, it may help update the information on the Project Advisor's portfolio while allowing for fair comparison in selecting a cohort.
- Ask about the best time to kick off Project coaching. This may be based on the grant application period, staffing, and competing priorities, and will help stagger offerings. The grant period could still be 18 months, but this conversation should help Project Advisors prioritize where to focus their attention within that period.
- Offer sequencing in the tracks to allow Projects to select a different track for successive years.
- Deepen questions in board engagement: Is the board actively involved in the organization's mission and fundraising efforts? Are board members willing to contribute financially and volunteer their time?



We have a clear understanding of how our project makes money. *

1 2 3 4

I don't have a clear picture of our revenue streams. — I understand our revenue streams.

If put on the spot, we could explain our project's work, how it makes an impact and what we need to succeed in under two minutes. *

- Yes
- No

We have X number of staff members dedicated to fundraising. *

- None
- One-Half (At least half of their time is spent fundraising)
- One
- More Than One

In our Fiscal Year 25/26 budget, we have funds allocated for fundraising. *

- Yes
- We would if we could.
- It's not a priority to spend money on fundraising in FY25/26.

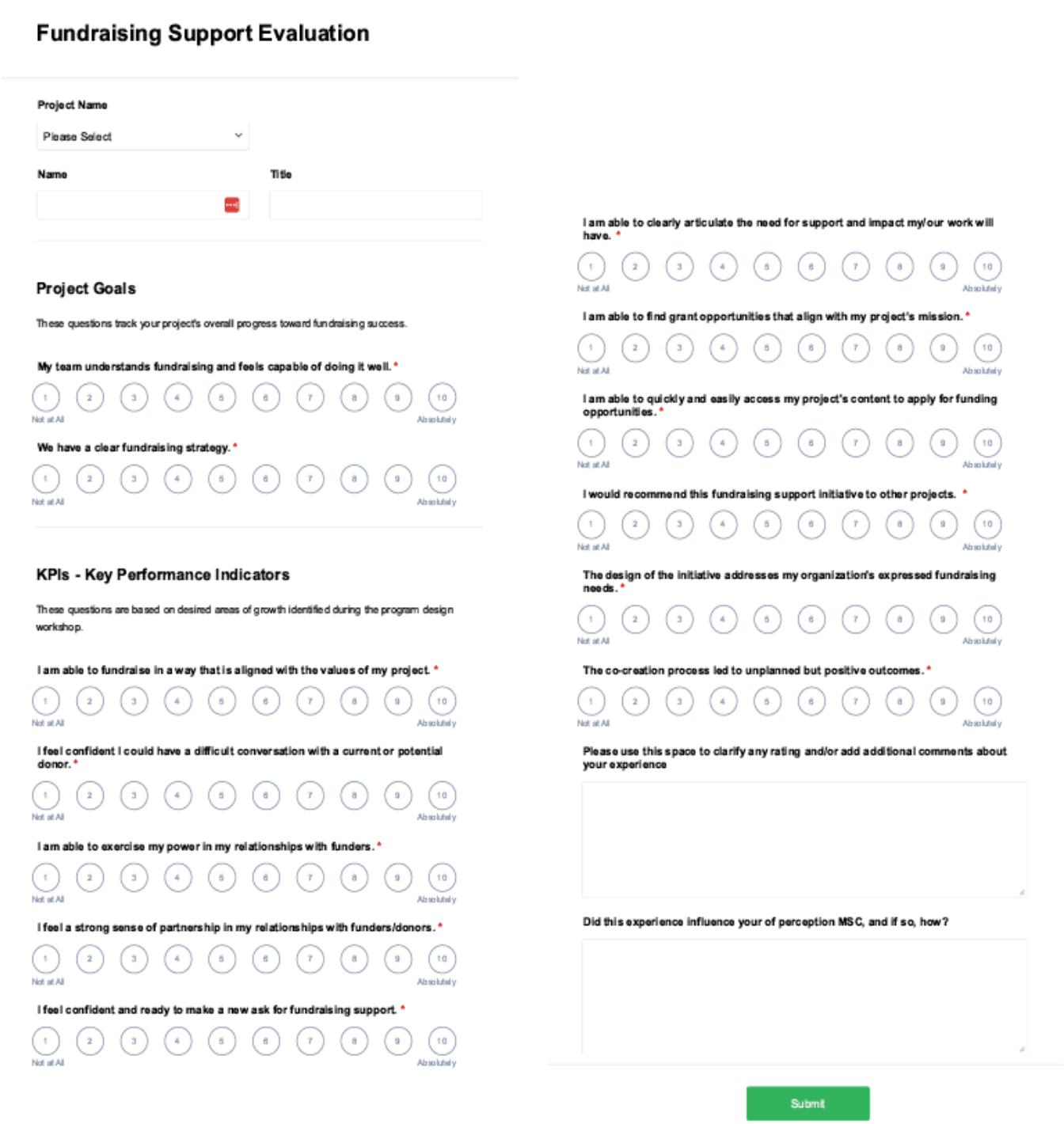
We can name how much revenue we'd like our project to bring in next year. *

- Yes
- No
- Kind of, but we're not sure it's a good target or feasible.

We know how to find information about our donors in Netsuite. *

- Yes
- No
- Kind of, but we might need help from the MSC team.

APPENDIX C: Evaluation Survey



Fundraising Support Evaluation

Project Name

Please Select

Name

Title

Project Goals

These questions track your project's overall progress toward fundraising success.

My team understands fundraising and feels capable of doing it well. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

We have a clear fundraising strategy. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

KPIs - Key Performance Indicators

These questions are based on desired areas of growth identified during the program design workshop.

I am able to fundraise in a way that is aligned with the values of my project. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I feel confident I could have a difficult conversation with a current or potential donor. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I am able to exercise my power in my relationships with funders. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I feel a strong sense of partnership in my relationships with funders/donors. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I feel confident and ready to make a new ask for fundraising support. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I am able to clearly articulate the need for support and impact my/our work will have. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I am able to find grant opportunities that align with my project's mission. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I am able to quickly and easily access my project's content to apply for funding opportunities. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

I would recommend this fundraising support initiative to other projects. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

The design of the initiative addresses my organization's expressed fundraising needs. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

The co-creation process led to unplanned but positive outcomes. *

1 2 3 4 5 6 7 8 9 10

Not at All — Absolutely

Please use this space to clarify any rating and/or add additional comments about your experience

Did this experience influence your of perception MSC, and if so, how?

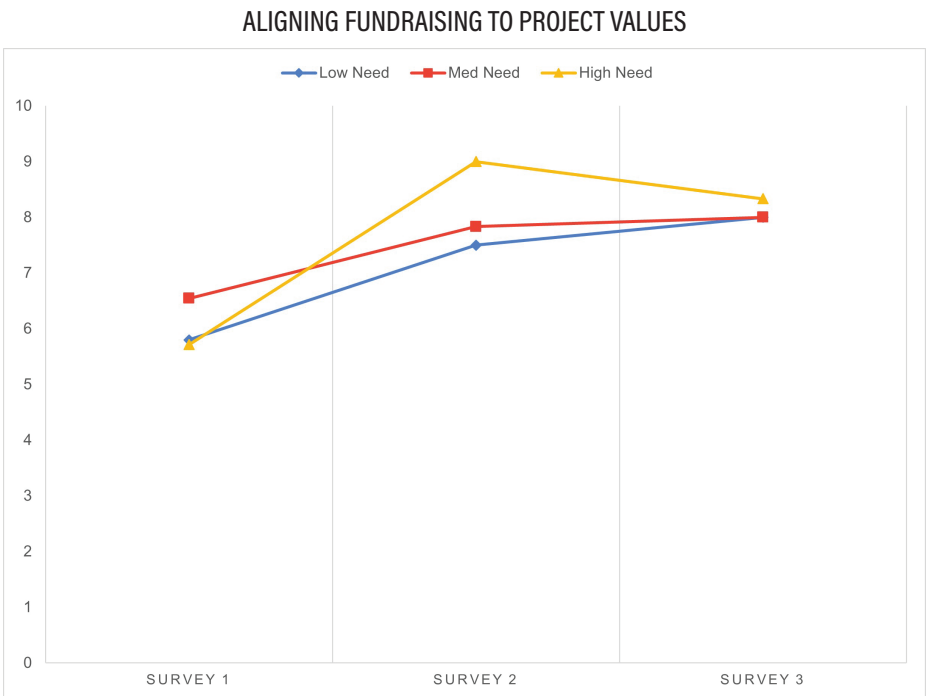
Submit

APPENDIX D: Snapshot of Pilot Program KPI Outcomes

This section focuses on the longitudinal analysis of the existing Key Performance Indicators (KPIs) determined by Movement Strategy Center (MSC) for the Fundraising Support Initiative (FSI) cohort. Of the 32 Projects that were initially selected, 10 were determined to be high need, 15 of were considered medium need, and six were noted as low need based on the readiness assessment and early financial health analysis. The KPI survey was administered three times to the participating cohort: First to determine the baseline in November 2023 (23 responses), the second in May 2024 at the initiative midway point (11 responses), and the last in July/August 2024 at the closing of the initiative (nine responses).[9]

A generally positive trend across most metrics indicates that the FSI increased the fundraising capacity of the participating Projects. This is evident in the increase in scores from Survey 1 to Survey 3 in most categories, which were triangulated by the focus group interviews. In the following year, there was consensus among staff to measure the advancement pathways (number of grants submitted, increased touchpoints in funders, expansion of funder network, etc.) beyond the fiscal gains within this first year. It is recommended to conduct another financial analysis of participating Projects in the fall of 2025 to determine the fiscal impact over time for this cohort of projects.

The survey has been best used to identify ebbs and flows that can be adjusted by the FTF in program delivery. Here, we present a snapshot of the most significant variances over time.[10] The differences in outcomes by the assigned consultants are not shown here. By the end of the initiative, the variance was insignificant, which is a testament to the thorough consultant selection process.



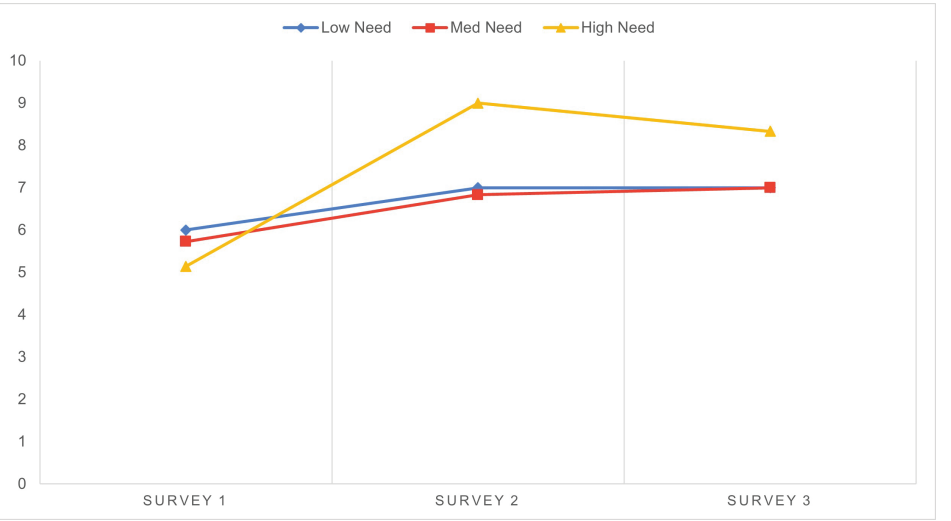
This chart shows a general increase in aligning Project values with fundraising practices. While organizations with varying levels of need started with baseline scores between 5.5-6.5, those with high needs experienced the most significant growth. Ultimately, they reached a level of alignment comparable to the other organizations, with scores of 8 or above.

[9] As noted above, it is recommended that responding to surveys be included in contracts and grant agreements with Project and Fiscal Sponsors for manageable prompts per year.

[10] As noted above, we recommend reducing the KPI survey Likert scale of 5 to 7 points to reduce subjective variance in selecting across the scale over time. Alternatively, if maintaining ten (10) selection points to select from, offer the previous scoring for the Project to determine whether they are better or worse off since the previous touchpoint.

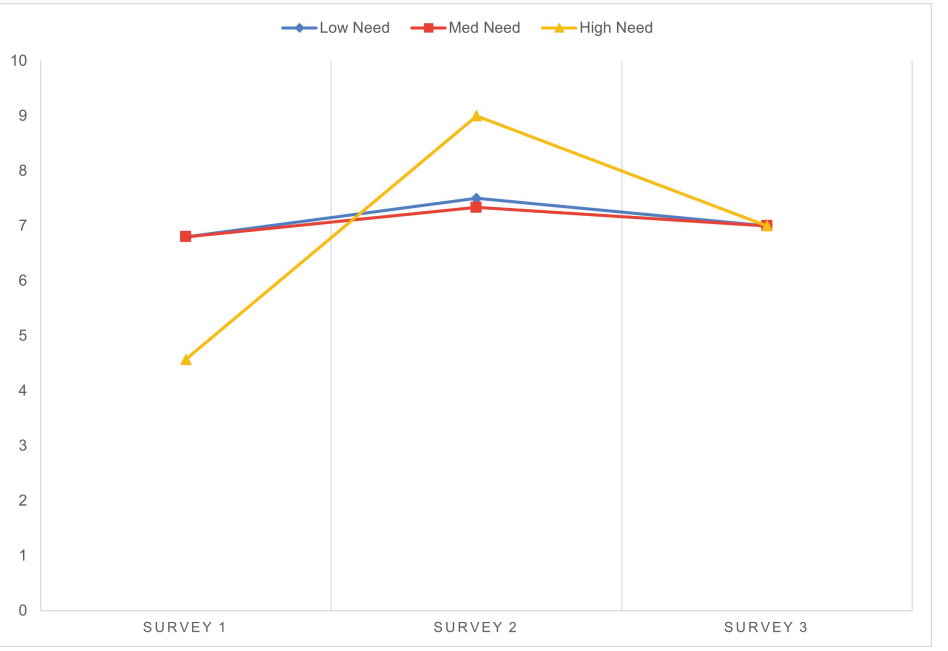
The consultation model involved generating content, writing grant applications, creating additional materials, and coaching Projects in real-time communication with donors. While there has been an overall increase across all levels, a notable rise in identifying mission-aligned funding sources for high need Projects was observed. In general, newer and high need Projects are still shaping their programming, and the decrease noted between May and August should be interpreted as a minor shift over the summer months.

IDENTIFYING RELEVANT GRANT OPPORTUNITIES

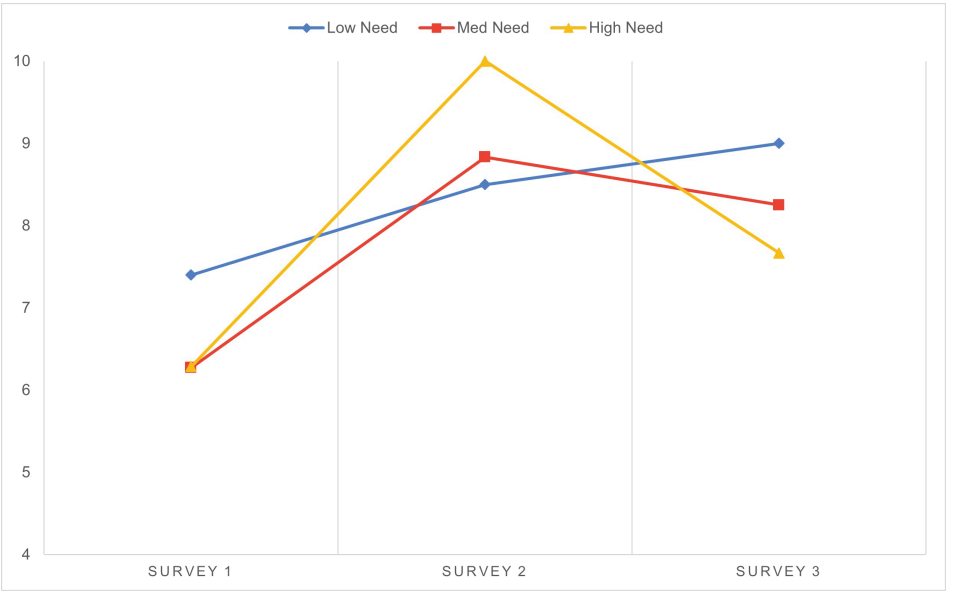


Team capacity is a vital sustainability indicator. It is not uncommon for fiscally sponsored social justice Projects to have teams as small as 1-2 full-time employees. As noted above, there is an opportunity to change approaches with low and medium need Projects, possibly by offering consultants some training on assessing individual Project needs at the start.

TEAM COMPREHENSION AND CONFIDENCE IN FUNDRAISING

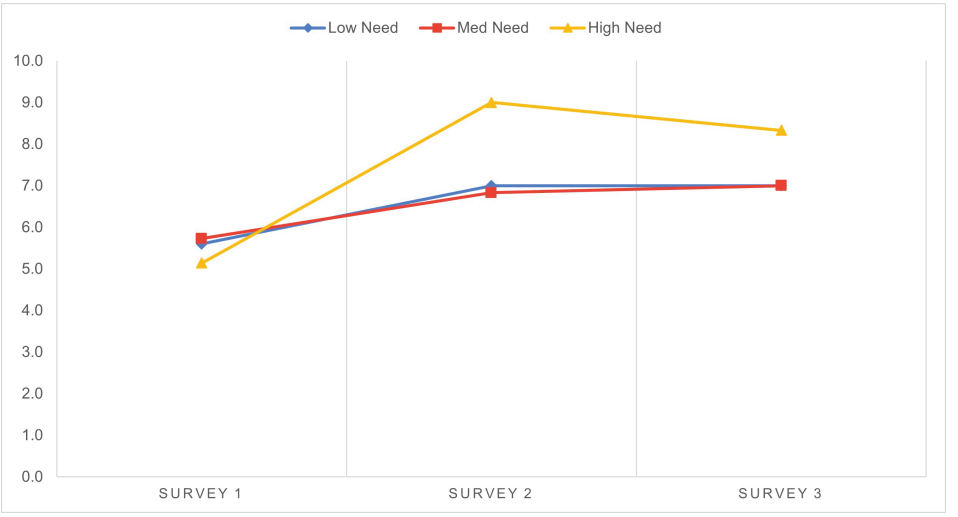


EASE OF ACCESS TO PROJECT MATERIALS FOR FUNDRAISING



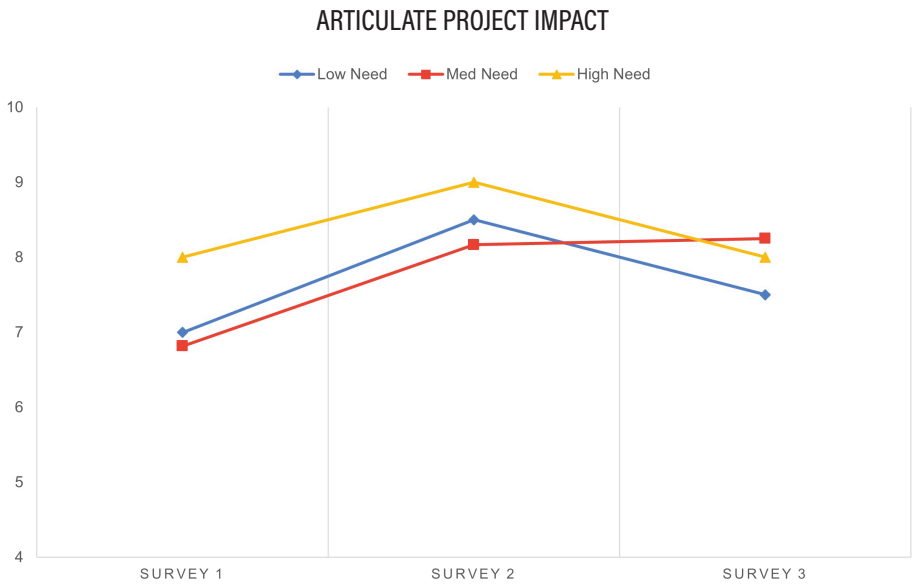
Projects with high levels of need demonstrated the most progress in easily accessing project materials for fundraising, which helped expedite grant applications and appeals to funders. Low need Projects have shown a consistent increase in this area and without the volatility of high need Projects, likely due to differences in technical capacity. Collectively addressing the need for better information management is both practical and valuable. Focus groups identified opportunities for peer-to-peer learning and sharing tools and techniques within the cohort.

DETERMINATION OF A CLEAR FUNDRAISING STRATEGY

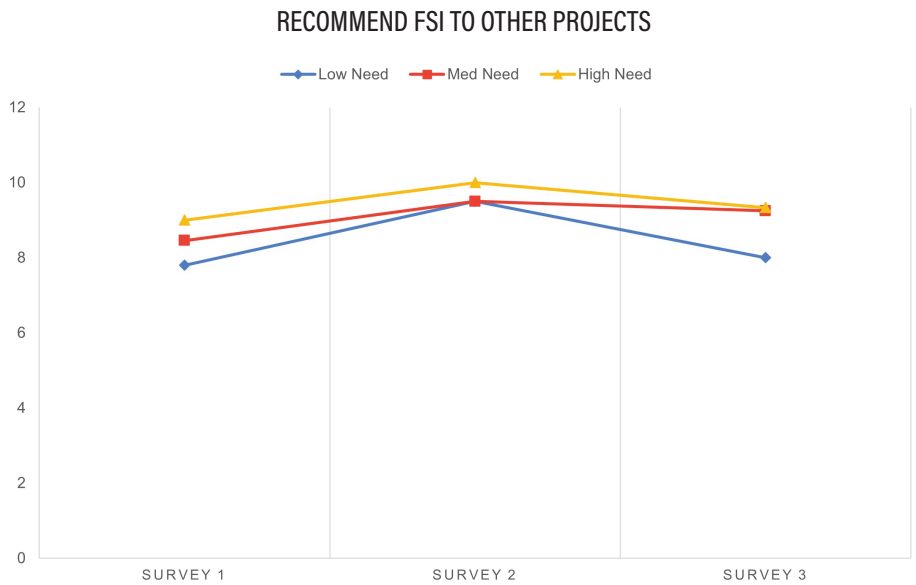


High need Projects benefited the most from developing a fundraising strategy, while the Projects with medium and low needs saw only minimal increases. This outcome highlights the distinction between "developing" a new fundraising strategy and "improving" an existing one. Nonetheless, all participating Projects demonstrated improvement by the end of the initiative in 2024.

During the FSI's pilot year, all Project levels demonstrated improved ability to articulate their need for support and the impact of their work. However, it remains unclear why both low and high need Projects experienced a similar pattern of increase at the midpoint, followed by a slight decline at the end. In contrast, medium need Projects continued to enhance their communication skills, although at a slower rate after the midpoint.



Projects having previous experience working with the MSC and involvement in the design process established a high baseline for satisfaction with the program. While satisfaction increased during the midpoint of the FSI, it declined toward the end. For low need Projects, satisfaction nearly returned to its initial level, though participants still expressed a high level of willingness to recommend the initiative to others. Medium and high need Projects scored the likelihood of recommending the FSI to others as high as 9.5 (out of 10) during programming.





MSC

Movement Strategy Center

2024 FUNDRAISING SUPPORT INITIATIVE EVALUATION

©2025 Movement Strategy Center
All rights reserved.

Parts of this report may be quoted or used as long as Movement Strategy Center is duly recognized. No part of this publication may be reproduced or transmitted for commercial purpose without prior permission.

To download any of our publications visit www.movementstrategy.org.

Movement Strategy Center
1625 Clay Street, 6th Floor
Oakland, CA 94612
communications@movementstrategy.org