



# Base Power Learning Community

● Webinar 5  
Resourcing the  
Base:  
c3/c4 Fundraising  
& Dues

# About the Learning Community

The **Base Power Learning Community** brings together progressive intermediaries and leaders to learn, document innovation, and create resources for multi-entity organizations building membership across their legal entities.



# About this Webinar Series

Recordings of previous  
webinars and registration for  
upcoming webinars are here:

[www.newleftaccelerator.org/  
events](http://www.newleftaccelerator.org/events)

1. **BASE-BUILDING & MULTI-ENTITY  
MEMBERSHIP MODELS**
2. **501(C)(3) AND (C)(4) MEMBERSHIP  
PROGRAMS: NAVIGATE THE LAW**
3. **USING YOUR 501(C)(4) TO ENGAGE  
YOUR MEMBERSHIP**
4. **RESOURCING THE BASE: C3/C4  
FUNDRAISING AND DUES**
5. **MEMBERSHIP AND DATA: DO YOU  
HAVE CONSENT FOR THAT?**  
(11/10/21 12pm PT)
6. **POWER OF THE MEMBERSHIP:  
HOW TO ENGAGE YOUR MEMBERS  
FOR ENDORSEMENTS**  
(Schedule TBD)

# Community Core Beliefs

**1. We recognize & name the complexity of base building work.**

**2. We take a learning stance to disrupt the traditional expert-learning mode.**

**3. We believe in collaboration.**

**4. We aspire to change structural limitations.**

# Community Norms

## **This is a learning space.**

What we learn here will also help us build better content for the movement in the future. You are contributing to movement learning-so please respond/share

## **Take care of you.**

We have two breaks scheduled but do what you need to be fully present in our conversation.

## **Anonymity.**

What is said or learned here will not be attributed to you or your organization in any way.

## **Your info.**

We aren't going to sell your info - we promise!

## **Recording.**

We are recording so we can share the presentation with others - but all questions or speaking from the audience and all attribution to any individual or group will be edited out.

# Active Participation in the Learning Community

*In the spirit of learning, we are requesting that you answer questions about the topics we'll be discussing throughout the presentation.*

*We'll send a report following the presentation.*

*Thank you for sharing your insights!*

**1) Go to [www.menti.com](https://www.menti.com) now on your phone, or if you have 2+ computer monitors, on one of those.**

**2) Enter the code 19288728**

**3) You should see our first question, “What are the two greatest challenges you face in building support across your c3/c4 organization?”**

**4) Answer away!**



# Progressive Multiplier

## Bethany Maki Managing Director

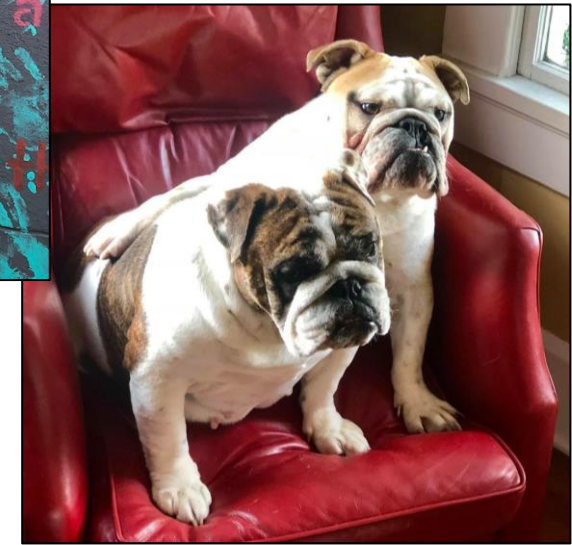
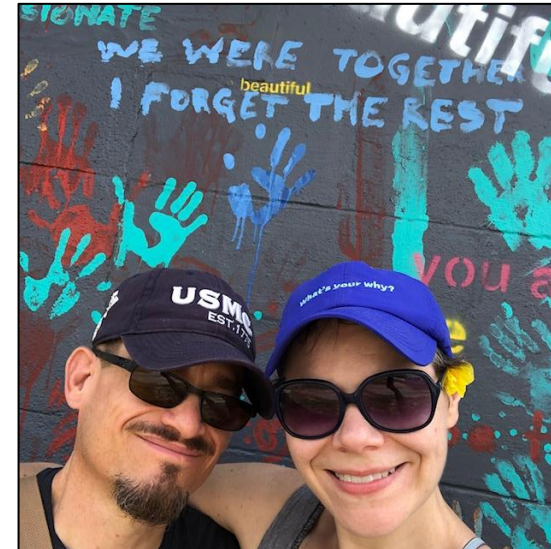
- 10 years fundraising at direct service nonprofits
- 10 years leading nonprofit digital and integrated fundraising strategy teams at large agencies
- 2 years growing the grantmaking and strategic assistance program at Progressive Multiplier, a funding intermediary supporting independent revenue generation (rev gen) projects for progressive nonprofits

### Learning stance (aka I'm no expert) in action

- Why aren't my clients who I donate to and volunteer with?
- The barriers to rev gen for power building and realizing you're the poster child for white supremacy in fundraising
- A little help from my friend and fellow fundraiser

### Me outside of rev gen

- Student of yoga & working toward beloved community
- Partner and caretaker to a PLWHA with an ABI
- My ancestors' wildest dream and worst nightmare
- Runner. Reader. Baker. Bulldog mom.



# Learning Goals

**At the end of this session, you should understand:**

- 1) The “whys” behind the hard of progressive rev gen**
- 2) How rev gen aligns with organizing, base building and mobilizing**
- 3) The infrastructure elements you need to maximize multi-entity rev gen**
- 4) What kinds of revenue you can raise**
- 5) How to decide what kinds of revenue you should raise**



# Schedule

Ready to  
get  
started?

- 1) Now - 3:26pm ET Real Talk
- 2) 3:27- 3:46pm ET The Who, What, Why and How of Rev Gen within a Base Power Building Vontext
- 3) 3:47 - 4:00pm ET Knowing the Framework: The Business of Multi-Entity Rev Gen, Part 1
- 4) 4:01 - 4:10pm ET Break
- 5) 4:11 - 4:51pm ET Knowing the Framework: The Business of Multi-Entity Rev Gen, Part 2
- 6) 4:52 - 4:56pm ET Designing the Rev Gen Model Mix That's Right for Your Group
- 7) 4:57 - 5:00pm ET Lessons Learned & Homework

# Real Talk

**Progressives, Power &  
Donor Motivation**



CAN YOU BE AN ANTI-CAPITALIST FUNDRAISER?!

# A Poll

IN YOUR CHAT INTRO, HOW MUCH DO YOU DISLIKE FUNDRAISING ON A SCALE OF 1 TO 4?

- 1: Fundraising IS mobilizing!
- 2: Fundraising is what it is, just part of the job.
- 3: I don't mind picking the pockets of the wealthy.
- 4: It's gross that we have to beg for the spoils of colonization.



# The White Supremacy of Donor Delight

“(There is a) pervasive, deeply internalized philosophy that as fundraisers, our job is to connect donors to what they care about, make them feel relevant and appreciated, and by doing that we help them realize their goals of making the world better, and everybody wins. It sounds fine on the surface, even noble, and many fundraisers have internalized this message over decades. I find it one of the biggest contributors to the very inequities we’re trying to fight.

That’s right, I know **it’s fundraising blasphemy, but if we’re going to advance equity and justice, we need to care LESS about what donors care about and care MORE about what will actually advance equity and justice...**

For decades, we—everyone in our field, but especially fundraisers—have told rich white donors that they are amazing. We tell them that there are so many great causes out there, and they just need to find something that resonates with them and make a contribution, and we, like humble tour guides or personal shoppers of equity, will help them find just the right fit. This is no longer good enough.

**We need a shift in approach.** We need a fundamental transformational shift in the world, where solutions do not come from the passions and interests of wealthy white donors, but from the communities most affected by injustice, the racialized and marginalized communities who have been screaming unheard for so long because white supremacy muffles our voices as it kills our people”

- [Vu Le](#)

NAMING WHAT WE'RE FIGHTING

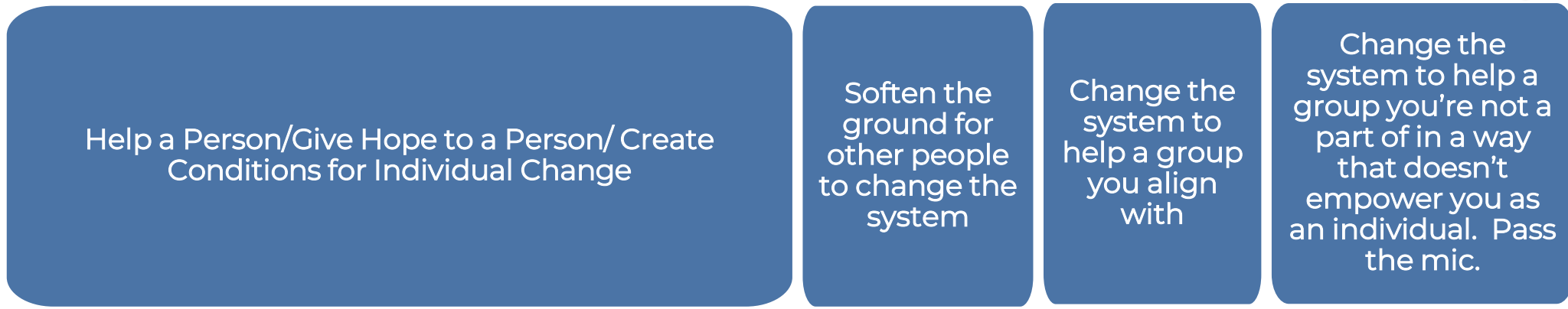
# Our Value Proposition to Donors

Operates within current power systems

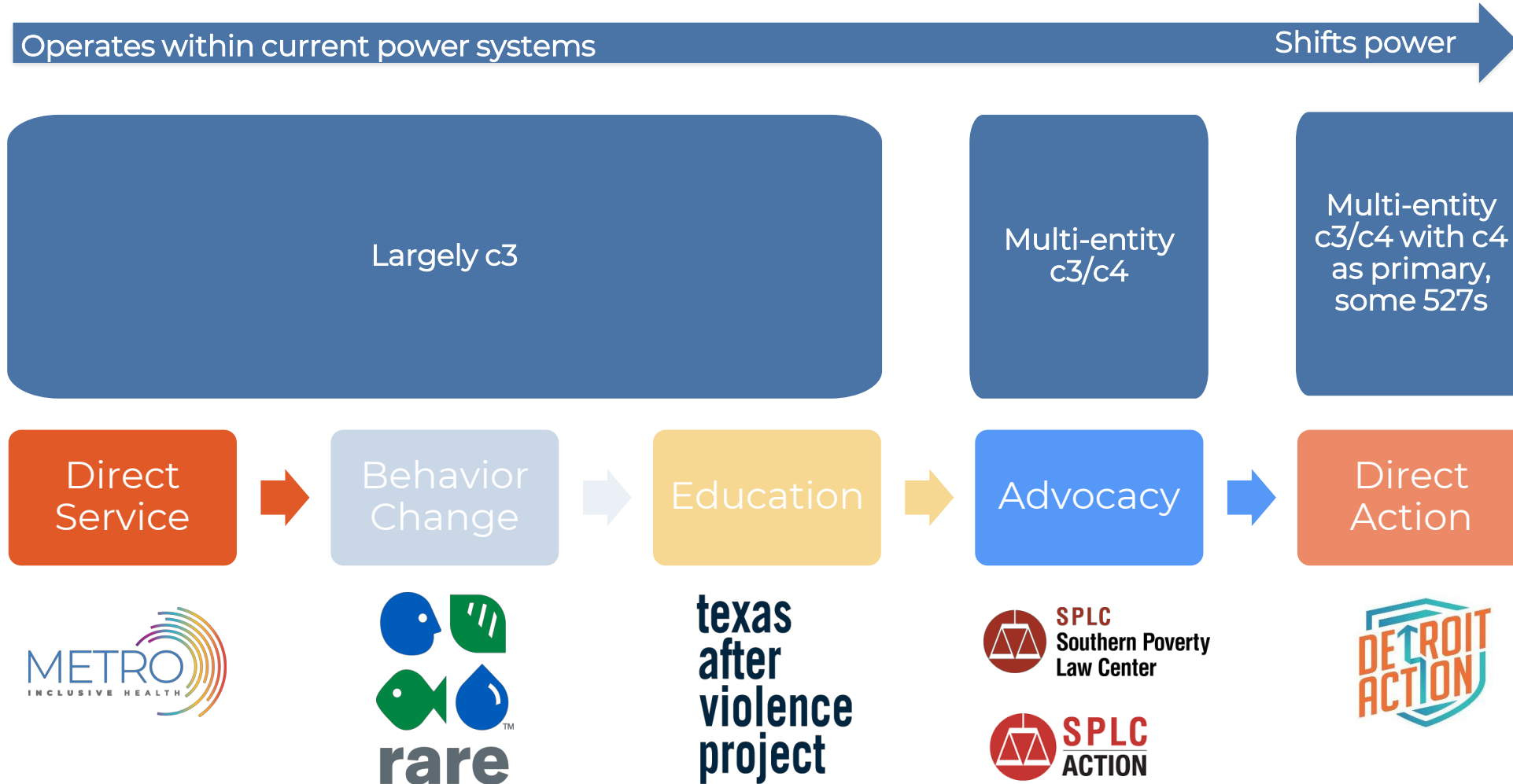
Shifts power (starts local)



# The Donors' Motivation



# Barrier of Legal Structures





Accomplishing  
Le's shift requires  
the alignment of  
“pass the mic” and  
donor motivation.



# Evolve from Delighting Donors to Building a Rev Gen Portfolio that includes Donor Organizing & Mobilizing

- Individuals who give money may or may not be directly impacted – this is for mass and deep base
- We have to build enough understanding among donors (individuals, philanthropies and businesses) of our work/goals that they want to show up and get their obligation to pass the mic
  - Make obvious an alignment with their values and world view, not “make them a hero” or “give a voice to the voiceless”
- Creates a pathway for donor organizing – deeper understanding and leadership of the work and its resourcing needs, a commitment to lead the resourcing drive
- Emphasis on mass donor volume with some tactics and strategic volume with others (quantity & quality)



There can be a temptation among movement organizations to think of donors and other organizations as externalities. We encounter so many well-meaning and dedicated folks every day in our work - we ask them to be 'supporters' but the only way they can support is another donation. Over time, this can tempt movement organizations into thinking of their development shops as a necessary distraction and their donors as simply ATM's.

But the truth is everyone we encounter in our work is valuable to the struggle: whether they are potential members, potential allies, or potential external partners. At CASA, our members and their dreams, struggles, and ambitions are the sole focus of our work, but **understanding that we have the capacity (and maybe even the duty) to organize these non-members as well - whether with us as allies or in coalition with us as partners - means that we can build power across new dimensions we might have understood previously to being purely tangential to the work.**

Donors come and go - we aren't interested in donors. We're interested in organizing lifelong allies who will show up in solidarity with our members. That re-framing has sparked changed organization-wide.

*Elizabeth Alex & Jesse Steele  
Lead Organizer & Sr. Director of Development  
CASA/CASA in Action*

# Who, What, Why & How?

Rev Gen in a

Base Power Building Context



“Power is **organized people**...”

Power Building Activity	Who	What	Why	How	
				<i>In a c3</i>	<i>In a c4+ (high level, check with Bolder Advocacy for nuances &amp; disclosure laws on partisan work &amp; its funding)</i>
<b>Organize</b>	Directly Impacted people (deep base)	Become leaders and take action together that makes demands of people in power that support collective self-interest	Shift power to the impacted	<ul style="list-style-type: none"> <li>Through informal or formal membership (where members are provided for in bylaws which list out members' powers and rights.)</li> <li>Member leadership development</li> <li>Participating in and coordinating organizational bodies</li> <li>Building coalitions and networks</li> <li>Speaking for the organization and its campaigns</li> <li>Issue advocacy and education</li> <li>All c3 permissible advocacy activities</li> </ul>	<ul style="list-style-type: none"> <li>Through informal or formal membership (where members are provided for in bylaws which list out members' powers and rights.)</li> <li>Member leadership development</li> <li>Participating in and coordinating organizational bodies</li> <li>Building coalitions and networks</li> <li>Speaking for the organization and its campaigns</li> <li>Issue advocacy and education</li> <li><b>Pay dues that increase org capacity to do work to win self-interest</b></li> <li>All c4 permissible advocacy activities</li> </ul>
<b>Mobilize</b>	Tiers of people from broader impacted community (mass base) to mildly concerned supporters	Advocate	Demonstrate power in numbers and commitment to an issue	<ul style="list-style-type: none"> <li>Rallying</li> <li>Changing narrative and culture and telling stories</li> <li>Limited lobbying (Pressuring a legislator in their capacity as legislator)</li> <li>Non-partisan voter education</li> <li>Non-partisan voter registration</li> <li>Etc.</li> </ul>	<ul style="list-style-type: none"> <li>Rallying</li> <li>Changing narrative and culture and telling stories</li> <li>Unlimited lobbying</li> <li>Working on passage or defeat of ballot measures</li> <li>Partisan political activity (candidate-specific GOTV, candidate pipeline dev)</li> <li>Allowable partisan work must take into consideration state and federal election laws</li> </ul>



## **SHAMELESS PITCH!!!!**

### **To dig deep into membership**

- What a member is legally
- Advantages of having dues revenue from c3 and/or c4 members
- Advocacy advantages and disadvantages of membership in c3 and c4
  - Etc.

**Please check out Webinar 2 here <https://vimeo.com/618358611>**



“Power is organized people, who have a **focus**....”



We focus our power on  
these arenas for change:

Electoral

Legislative

Judicial

Administration

Communication

Corporate



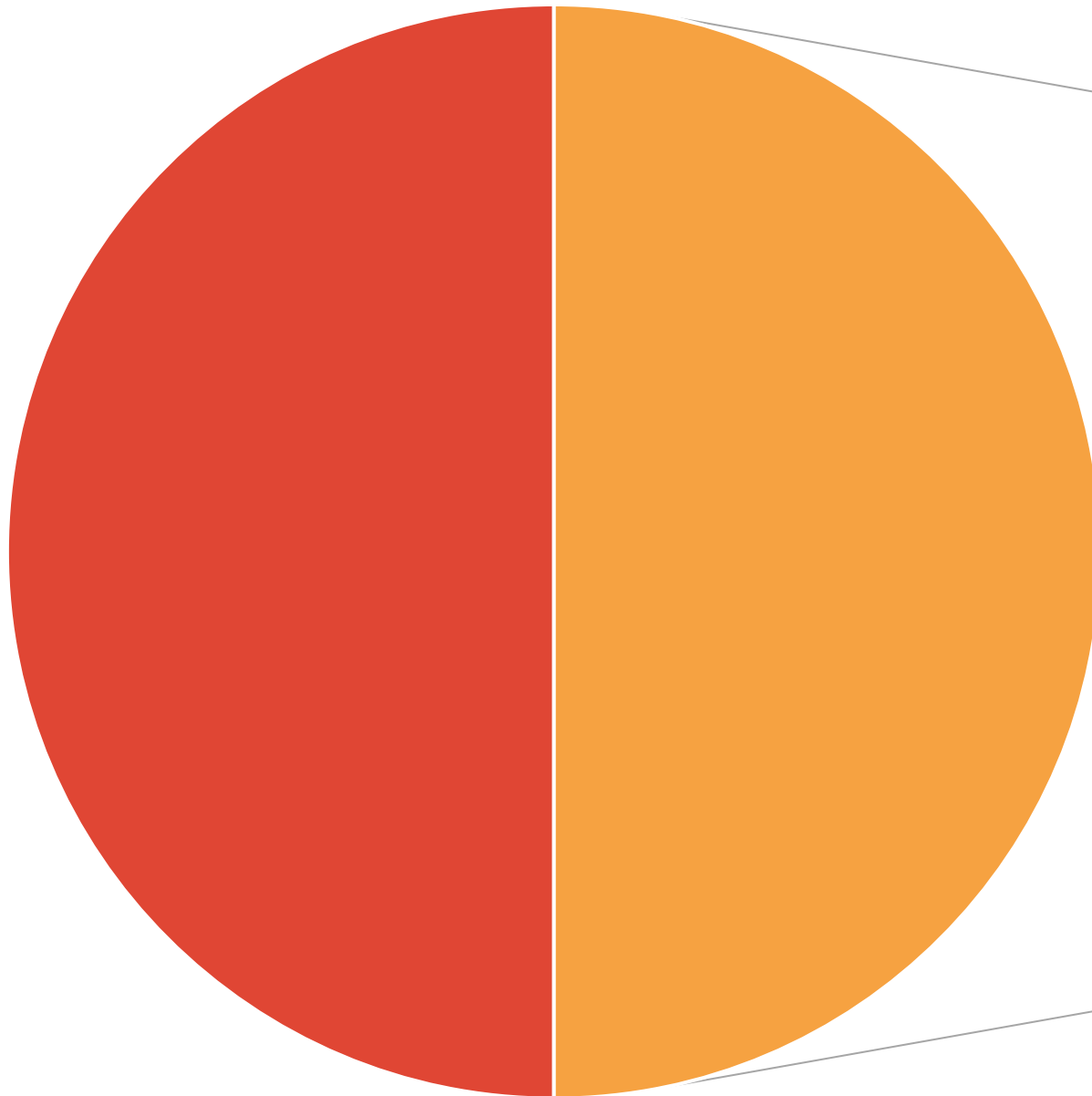


“Power is organized people, who have a focus, and **organized money.**”

—James Pearlstein , Senior Organizer  
Virginians Organized for Interfaith Community Engagement

Rev Gen Activity	Who	What	Why	How	
				<i>In a c3</i>	<i>In a c4+ (high level, check with Bolder Advocacy for nuances &amp; disclosure laws on partisan work &amp; its funding)</i>
<b>Mobilize</b>	Tiers of people from broader impacted community (mass base) to mildly concerned supporters	Financially support	Demonstrate personal power and commitment to an issue	<ul style="list-style-type: none"> <li>• Make tax-deductible donations</li> <li>• Pay membership dues (lobbying advantage)</li> <li>• Buy</li> <li>• Fundraise</li> </ul>	<ul style="list-style-type: none"> <li>• Make donations</li> <li>• Pay membership dues</li> <li>• Buy</li> <li>• Fundraise</li> </ul>
<b>Mobilize</b>	Institutional Philanthropy (Foundations, LLCs & Hybrids, Labor Unions, Donor Networks)	Financially support	<p>Demonstrate institutional power and commitment to an issue</p> <p>Provide for social welfare</p> <p>Reallocate wealth</p>	<ul style="list-style-type: none"> <li>• General operating or programmatic use widely available</li> <li>• Restricted from being used for electoral or candidate activities (can legally be used for non-candidate GOTV and limited lobbying)</li> </ul>	<ul style="list-style-type: none"> <li>• Grants for c4s less widely available, if given must be used for permissible 501(c)(3) public charity activity except lobbying and voter registration.</li> <li>• Some foundations have c4 affiliates.</li> <li>• Donor networks are key.</li> <li>• Labor and LLC may fund c4 and c5.</li> </ul>
<b>Mobilize</b>	For-Profit Businesses	<p>Financially support</p> <p>OR</p> <p>Take for-profit tool set and put it in service of progressive allies and their strategies</p>	<p>Demonstrate corporate power and commitment to an issue</p> <p>Improve brand image and “better society”</p>	<ul style="list-style-type: none"> <li>• Corporate social responsibility programs can include philanthropic donations</li> <li>• Great source of matching gifts for independent campaigns, especially at aspiring social justice companies</li> <li>• New models emerging</li> </ul>	<ul style="list-style-type: none"> <li>• Likely can't be used for political activity</li> <li>• Grant terms or any documentation that accompanies a contribution should be carefully reviewed to understand what, if any, restrictions apply to the funds</li> </ul>

## Goal: A Balanced Rev Gen Portfolio



A balanced rev gen portfolio protects your organization against having too much revenue (and arguably power) at risk. Balance could be this 50/50 rule OR diversity within a type of rev gen (i.e. a broad range of types of foundations).

■ Independent Revenue

■ Philanthropic Revenue

# POLL

(open [menti.com](https://www.menti.com),  
4186 9779)

WHAT DO YOU DO TO BUILD POWER?

GO.



**POLL**

**IN WHAT AREAS DO YOU  
FOCUS YOUR POWER?**

**GO.**

**POLL**

**HOW DO YOU GENERATE REVENUE TO  
FINANCE YOUR MISSION?**

**GO.**

# Knowing the Framework

The Business of ●  
Multi-Entity Rev Gen



Infrastructure  
you need to  
maximize  
revenue that  
supports power  
building



## The Big Question

# Are you unapologetically out as a c4?

- It's critical to make this decision about your organization's risk tolerance and identity before you work on your rev gen business infrastructure.
- Is the goal to have as much of your revenue have political speech as possible or not?



IF YES...

# Three Tactics to Maximize c4 Revenue

- Organizing your entities' financial resources to work strategically and legally together can be one of the most impactful mission strategies you deploy in 2022. In this volatile time, (c)(3)-permissible tactics are not enough to achieve policy wins and (c)(4) dollars need to be focused on that which only they can do like lobbying.
- There are 3 primary tactics through which we make sure we're set up to maximize c4 revenue
  - **c3 & c4 list sharing & tech to support it**
  - **c3 to c4 grantmaking**
  - **c3 reserve loans and lines of credit to c4**



## PROCESS

# Multi-entity list sharing and tech

- Your mass base list is one of your largest potential rev gen assets
- It is easier to move resources , including your list, from a (c)(4) to a (c)(3)
  - Best for those you're mobilizing for financial support to come in through c4
  - Privacy policy that allows for c4 to solicit for c3 and vice versa
- (c)(3) may sell or rent lists for fair market value— or trade for equal value
- On web sites, must make sure that c3 is segregated from any c4 activity – safest is to have 2 sites
- Again, shameless pitch for Webinar 2 from our friends at Bolder Advocacy!!

# c3 grant to increase (c)(4) capacity & flexibility

	<b>C4 Standard \$50K Budget</b>	<b>C3 \$30K grant to C4 to make budget \$80K</b>
<b>Unrestricted Fundraising Money</b>	\$35K	\$25K + \$10K of c3 grant= \$35K
<b>Restricted Fundraising Money</b>		
<b>Administration</b>	\$15K	\$5K + \$10K of c3 grant = \$15K
<b>Restricted Campaign Money</b>		\$10K from Unrestricted Fundraising + \$10K from Administration + \$10K from Unrestricted Campaign Money
<b>Unrestricted Campaign Money</b>	\$50K	\$40K + \$10K of c3 grant = \$50K

- Review your budget to determine the amount (c)(3) should grant to (c)(4) within context of meeting (c)(4) 60% social welfare primary purpose requirement
  - 60% is not law and groups may choose a lower split if they are more comfortable with risk and have not agreed to the 60% as part of their IRS approval process.
- Draft grant agreement to ensure funds are being used for (c)(3) -permissible purposes and lobbying limit of (c)(3) is not surpassed,
- Adhere closely to reporting needs of (c)(3)

# c3 reserve loan to increase (c)(4) restricted activities

	<b>C4 Standard \$50K Budget</b>	<b>C3 reserve \$30K loan to C4 to make budget \$80K</b>
<b>Unrestricted Fundraising Money</b>	\$35K	\$35K
<b>Restricted Fundraising Money</b>		\$15K from c3 loan
<b>Administration</b>	\$15K	\$15K
<b>Restricted Campaign Money</b>		\$15K from c3 loan
<b>Unrestricted Campaign Money</b>	\$50K	\$50K

- If you can't raise the funds initially to your c4 from a donor source, you may not be able to pay them back (i.e., a c3 isn't typically advised to give a loan to form a c4)
- Loan must be made at market rate
- Should not pursue if there's any chance the c4 won't be able to repay the c3
- Can fund restricted activities where a grant from your c3 can't

# POLL

(open [menti.com](https://www.menti.com),  
4186 9779)

**WHICH INFRASTRUCTURE ELEMENTS DO YOU  
HAVE IN PLACE TO MAXIMIZE YOUR  
REVENUE THAT CAN HELP YOU BUILD  
POWER?**

**GO.**



# **BREAK**

**See you back here at  
4:10 ET/1:10 PT**



Generate Revenue:  
Institutional  
Philanthropy





# What most progressive budgets are built on

- What you can use it for:
  - General operating – much harder to get, especially for c4
  - Program
- Where to look for it:
  - Grants.gov
  - GrantWatch
  - Instrumentl
  - Foundation Directory Online (Candid)
  - JustFund
  - Chronicle of Philanthropy
  - Board members
- Be aware of:
  - Creating a mix of different alignment factors so if you're not “popular” this year you lessen risk
  - Contract language that isn't legally required and limits to power building

## Amnesty International: COVID-19 and Asylum Seekers Pitch

Section	Content
Introduction	Hi! How're you doing today?  My name is _____ and I'm with the Grassroots Team on behalf Amnesty International, the world's largest human rights organization.
Opening Questions	<b>We're urgently fighting for immigrants and asylum seekers during COVID-19.</b>  <b>Is this an issue you care about?</b>
The Problem	<b>I'm glad you care.</b>  <b>There are over 25-million people displaced globally, the worst refugee crisis since the end of World War II. This issue is EVEN MORE compounded now with the threat of COVID-19.</b>  <b>Immigrants and asylum seekers are detained in overcrowded, unhygienic conditions with little to no access to medical care.</b>  <b>That's horrible, right?</b>
The Solution	<b>Amnesty has ramped up its efforts, and is playing a crucial role in response to the pandemic.</b>  <b>We're launching crisis teams to the most affected areas. These teams are working with the families lawyers to build cases and actions to free them.</b>  <b>Our teams also collect evidence on human rights violations to hold the violators accountable, and put pressure on our politicians to create the legislative change we desperately need.</b>
Moment	<b>Look, it's clear our administration is not focused on leading the way on defending human rights, and they're more interested to use families as political tools instead of bringing people together.</b>  <b>So, clearly there is still a lot more that needs to be done and we can't do it alone.</b>
The Close and Monthly Donation	<b>Do you believe that when people like you and I come together, we can create change?</b>  <b>Great, the best way you can help today is joining Amnesty International as a monthly gift giver (or monthly sustaining member) through your mobile banking account. That's how we have the resources to run our campaigns.</b>  <b>As a member your voice will join a family of 8 million members who share your values to protect human rights, and that's how we win.</b>  <b>We need you. Let's get you on board!</b>
Thank You!	Thank you so much from myself, and from the 25+ million refugees who aren't here to say it. Have a great day!

## SOURCES FOR c4 INSTITUTIONAL FUNDING

# Think broader

- C4 affiliates of progressive public foundations (i.e., OSPC)
- C4 health conversion foundations focused on social determinants of health (i.e., Northwest Health Foundation)
- LLC and hybrids (i.e., Open Philanthropy Project DAF)
- Intermediaries and labor unions (i.e., CPD, SEIU)
- Agile Groups (i.e., Way to Win, Movement Voter Project)
- National and state donor tables
- Progressive Multiplier
  - Unique IRS approval to grant c3 to c4 to cover program costs incurred in the course of c4 fundraising



I believe that in one of its best versions, **philanthropy plays an intermediary role in a process of returning to impacted communities' resources that have been historically extracted from them through unjust systems and structures**, in order to support the efforts of these communities to dismantle such unjust systems and structures. This doesn't mean that philanthropy is the only or more effective way to return those resources to communities, strong progressive taxation is of course another way. However, philanthropy can be a strategic tool to this end **if it sees itself as being at the service of organized communities and not the other way around, and if increasingly adopts mechanisms that give those impacted communities more influence and decision-making power in funding**, some of which is being developed on various examples of participatory grantmaking.

Building power groups have done a lot of important work to educate philanthropy about how critical is to support base-building organizing in order to achieve long-term, large scale civic engagement impact. This has resulted in increasing numbers of grantmakers interested in support groups that build power through organizing, though these investments are of course far from what is needed. This is **the first way in which philanthropy can build power: increase dramatically the funds towards base-building organizing..The second and probably more transformative way in which philanthropy can help build power is to shift from a funding strategy of giving organizations significant resources for a few months before an election and going away after that, towards a long-term funding strategy** that provides stability to groups in ways that allow them to develop strong staffs and organizers who build strong relationships in the community that allow communities to mobilize more consistently and effectively around issues and civic engagement campaigns.

*Domenico Romero  
Senior Program Officer  
Unitarian Universalist Veatch Program at Shelter Rock*



Generate Revenue:  
Corporate  
Alliances



DATE, 2021

[Name]  
[Address]  
[Address]

Dear [Name],

Led by people of color, immigrants and refugees, Unite Oregon (UO) is a statewide racial justice nonprofit working to build a unified intercultural movement for justice. We serve over 22,000 members across Oregon through four chapters, but our headquarters are located in East Portland.

In 2020, protests for racial justice sparked new and urgent conversations about racial equity, particularly in Oregon. And yet, while people of color make up close to 25% of Oregon's population, only 10% of Oregon's State Senators and 15% of representatives are Black, Indigenous, People of Color (BIPOC). With the changing administration, now is the time to build power for immigrants, refugees, and Black, Indigenous, People of Color (IR-BIPOC) to shape the policies that affect them and create a just and more equitable Oregon.

Unite Oregon is launching a new leadership incubator series in February 2022 designed to build power for emerging IR-BIPOC leaders through political education, advocacy, and organizing skills delivered in a culturally responsive BIPOC-created/led curriculum. The **RIPPLE (Refugee, Immigrant, People of Color Power-Building, Leadership & Education)** program will train 100-125 IR-BIPOC leaders through a 5-week intensive series: *Levels of Government; Grassroots to Policy; Advocacy & Organizing; Navigating Funding; Running for Office.*

IR-BIPOC people face barriers to accessing specialized training - many distrust governments due to racist and xenophobic experiences or language barriers and many cannot afford to attend higher education programs. We want to offer this innovative program **free-of-charge**, to eliminate barriers to access.

To be able to offer this program tuition-free, we are seeking community partners like [insert company name] to invest in IR-BIPOC leadership in Oregon and sponsor leaders in the program. As a sponsor, your logo and sponsorship will be featured on the program homepage, presentations in the program, promoted via our newsletter (8k+ subscribers), and our social media channels (17,200+ subscribers). Sponsorship levels include:

- Sponsor one learning track (Grassroots to Policy, etc.) for 25 participants: \$7,500
- Sponsor one leader (full series): \$1,500
- Sponsor a leader for one learning track: \$300

We would be thrilled to have [insert company name] join us in building IR-BIPOC community power in Oregon. Please do not hesitate to contact me at [email address] or [phone number]. Thank you very much for your consideration in joining us to create a more equitable and thriving Oregon.

Sincerely,

[Staff name and position]

## TRADITIONAL CORPORATE ALLIANCES

# Brand building & social good

- Corporate giving versus corporate foundation grants
  - If corporate gift, check with counsel to structure so it's not taxable as advertising income
- What they want from you:
  - Subject alignment
  - Value alignment
  - Activities that will engage and excite their staff without burdening them
  - A way to quantifiably measure the success of your partnership and how it fits into their broader CSR strategy
- What else you want from them:
  - Scale and reach you can't get on your own
  - Unrestricted revenue, only take restricted if it makes financial sense for you.
  - Time, talent and treasure from staff
- Where to find them:
  - Obvious subject alignment businesses
    - Tougher for advocacy orgs but not impossible
  - Large employers in your area; don't discount branches of national companies
  - Work your network – especially Board connections
  - CSR or marketing entry point, HR for employee engagement, potentially DEI lead



**BEN & JERRY'S** FLAVORS SHOPS & CATERING VALUES ABOUT US WHAT'S NEW

Issues We Care About

## We use our position to influence change

We believe that business has a responsibility and a unique opportunity to be a powerful lever of change in the world. We can use traditional and contemporary business tools to drive systemic progressive social change by advancing the strategies of the larger movements that deal with those issues, such as climate justice and social equity.

### Our Current Focus

#### Criminal Justice Reform

It's time to transform our failing, racist criminal justice system, reimagine public safety, defund the police, and invest in communities of color.

[Learn More About Criminal Justice Reform](#)

The corporate alliance landscape is changing – whether corporations want to or not they are getting pulled into social justice issues. Look at what happened in Georgia to Delta and Coke around voting rights; they stumbled and then got right with it. Around our company with Palestine. Companies’ consumers are looking for them to have a point of view.

How do power building nonprofits create a path for companies to be real movement allies? It’s a really interesting moment in the wake of 2020 and companies need an authentic path and partners to handle this right.

*Christopher Miller  
Head of Global Activism Strategy  
Ben & Jerry’s*

# POLL

(open [menti.com](https://www.menti.com),  
4186 9779)

**FROM WHAT TYPES OF PHILANTHROPIC  
INSTITUTIONS ARE YOU ACTIVELY SEEKING  
SUPPORT THAT FACILITATES POWER  
BUILDING?**

**GO.**

# POLL

**DO YOU HAVE CORPORATE PARTNERS WHO  
HELP YOU FUND POWER BUILDING  
OR HELP YOU IN YOUR  
ORGANIZING/MOBILIZING WORK?**

**GO.**





Generate Revenue:  
Independent  
Revenue  
Generation

## THE NEED FOR INDEPENDENT REVENUE ACCORDING TO OUR GRANTEE PARTNERS

### READINESS

“Having the plan ready to fundraise for a hardship fund for an economic crisis...let us launch immediately (when the pandemic hit). You have to be ready when the crisis comes, so investing in the development of frameworks that won't have an immediate ROI is critical to long-term revenue.”



Erica Smiley  
Executive Director  
Jobs With Justice

### AGILITY

“Having a sustainable, member revenue-generating system allows us to move in those moments (like the uprising for racial justice) at the speed, velocity, and size that the moment demands.”



Maria Tchijov  
Vice President, Advocacy & Membership  
UltraViolet

### SCALE

“We're nowhere near our aspirations. Even when you have a robust organization, great staff, and a deep commitment, raising independent revenue is hard... Scaling up investment allows us to have access to more independent revenue over time to have more agility to set the priorities for our work.”



Andrew Friedman  
Co-Executive Director  
Center for Popular Democracy

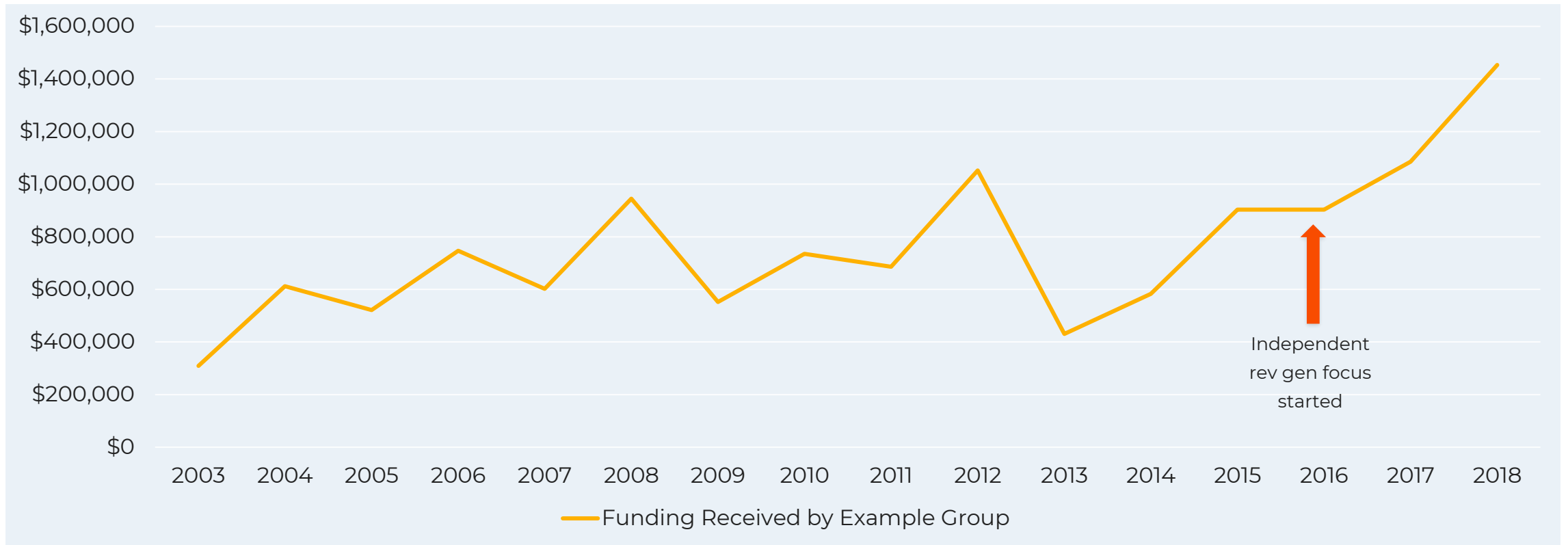
### ACCOUNTABILITY

“There is a racial equity and intersectional lens to this effort. This kind of fundraising is about giving a broader swath of the community a broader ownership of the work (we do)—so it becomes your stake, and you speak with a voice of ownership—it becomes what are WE going to do about this?”



Nadine Smith  
Executive Director  
Equality Florida

# Economic liberation from Boom & Bust



## DUES FROM FORMAL & INFORMAL MEMBERS

- Think about dues through the lens of donor/payer motivation we covered up front
- From the person paying's perspective, some dues are membership donations through which she's advocating with her dollars for something she is aligned with and may or may not directly benefit her. Some are dues which carry an expectation of direct service and/or close partnership in winning power starting close to home.

The image shows a membership card for Bethany Maki and a corresponding donation form. The card features the Planned Parenthood logo and the text "Act. No matter what." Below the card is a donation form with the heading "JOIN THE FIGHT FOR REPRODUCTIVE FREEDOM AND ACCESS". The form includes a message: "We need the support of 857 Florida residents to join us on the front lines. Will you be one of them?" and a list of contribution options: \$50, \$75\*, \$100, \$500, and "Other \$\_\_\_\_\_". A note states: "\*We're in the fight of our lives, and your gift is urgently needed." The form also includes a name field for Bethany B. Maki and a QR code at the bottom.

Organization, mobilizing mass national base through dues

The image shows a digital form for ACIU membership. It lists "Member Benefits" and "Member Responsibilities". The benefits include participation in events, newsletters, and scholarships. The responsibilities include working towards the organization's vision, participating in campaigns, and paying dues. Below the text is a payment section with a "Next" button.

**Member Benefits:**

- Members are invited to participate in ACIU events, trainings and membership meetings.
- Members receive ACIU's online newsletter and other important up-to-date information.
- Members can apply for scholarships for travel/participation in ACIU member meetings.

**Member Responsibilities:**

- Work to pursue ACIU's vision and mission.
- Participate in ACIU campaigns.
- Pay membership dues.

**Why should members contribute?**

- Building a better Alabama takes time and money.
- Movements are built over time, and investing in ACIU is an investment in your future.
- To show that we believe in the vision and will work to achieve it.

1 Amount 2 Details 3 Payment

Minimum / Míximo (\$45) \$50 \$100 \$500

\$0.00

Next



Direct action organization, organizing state-based deep base through dues

## DUES FROM FORMAL & INFORMAL MEMBERS

- Unrestricted revenue (which in c4 can be used for partisan work)
- Predictable cash flow
- Constituent engagement
- Formal membership means governance considerations (ahem, webinar 2) so consider this rev gen option from all angles

Direct action  
organization,  
organizing  
through dues

**Member Benefits:**

- Members are invited to participate in ACU events, trainings and membership meetings.
- Members receive ACU's online newsletter and other important up-to-date information.
- Members can apply for scholarships for travel/participation in ACU member meetings.

**Member Responsibilities:**

- Work to pursue ACU's vision and mission.
- Participate in ACU campaigns.
- Pay membership dues.

**Why should members contribute?**

- Building a better Alabama takes time and money.
- Movements are built over time, and investing in ACU is an investment in your future.
- To show that we believe in the vision and will work to achieve it.

1 Amount 2 Details 3 Payment

Minimum / Mínimo (\$45) **\$50** **\$100** **\$500**

Next



Direct action  
organization,  
mobilizing  
through donations

**ACIJ**  
Alabama Coalition for Immigrant Justice

Your support of ACIJ helps us continue our work to advocate for the rights and dignity of all people by cultivating just policies, developing grassroots leadership and participation, building alliances, and amplifying the voices and contributions of immigrants in Alabama.

If you would like to become a member, [click here](#).

Su apoyo a ACIJ nos ayuda a continuar nuestro trabajo para abogar por los derechos y la dignidad de todas las personas mediante el cultivo de políticas justas, alentando el liderazgo y la participación de base, construyendo alianzas y amplificando las voces y las contribuciones de los inmigrantes en Alabama.

Si desea ser miembro, haga [clic aquí](#).

Forget this device. [fastaction](#)

1 Amount 2 Details 3 Payment

**\$15** **\$25** **\$45** **\$50**



## DONATIONS FROM INDIVIDUALS

Between xenophobic attacks and the COVID-19 Pandemic, immigrants experienced tremendous challenges in 2020. But **CASA never stopped fighting for our communities, and neither did you.**

So in 2021 let us continue uplifting immigrant families through CASA programs and services, and empowering them to organizing and advocating for **comprehensive immigration reform, climate justice, an equitable recovery from this health and economic crisis, and economic prosperity for working-class families.**

### Support Immigrant Families

Forget this device. fastaction

1 Amount 2 Details 3 Payment

\$20 \$50 \$100 \$500

\$1,000 \$2,000 \$ 0.00

Make this contribution: Monthly Until I Contact You

I'd like to help cover the transaction fees for my donation. My total amount will be \$51.83.

I'd like to make this contribution in honor or in memory of someone

Next



#### Plan a gift in your will

You can make a gift to CASA in your will or trust at no cost today, and create a lasting legacy dedicated to community organizing and supporting immigrant families.

Our trusted partners at FreeWill have a free, online will-writing service that only takes 20 minutes or less to use. [Learn more and get started today.](#)

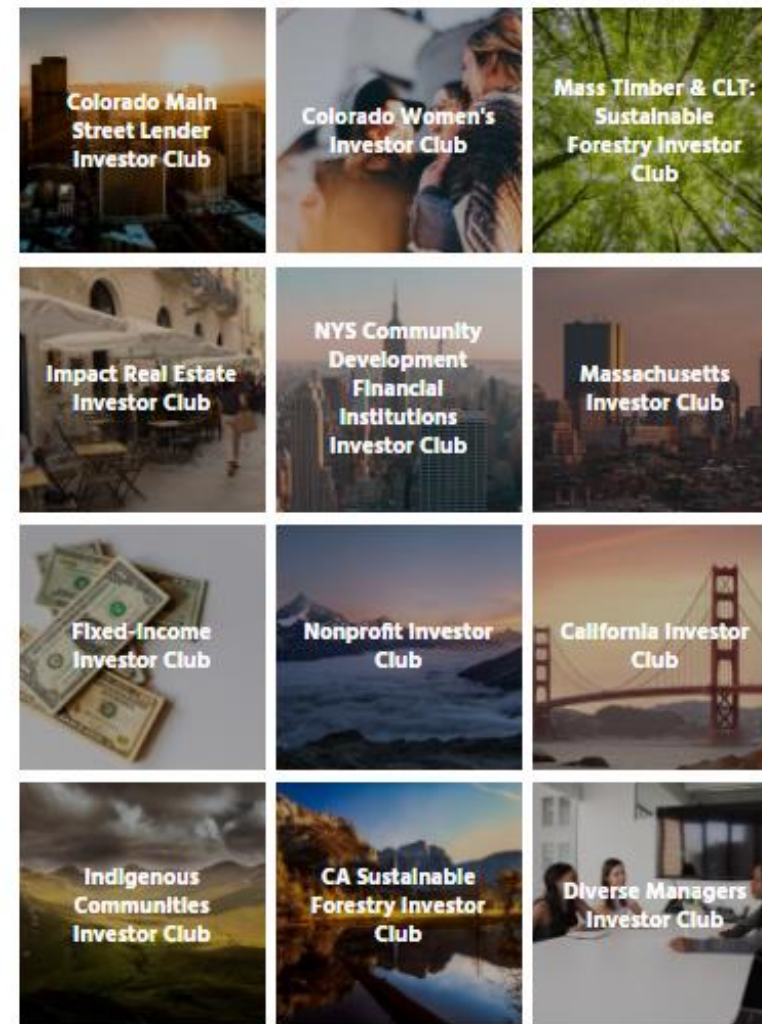
- Mobilize through donations as one of many tactics
- Small dollar/midlevel/major/ planned gifts

- Be c4 first in at least small dollar through midlevel approach
  - Focus on storytelling around policy effect
- The smaller the amount, the less of a barrier c4 status is because people are advocating with their money not looking for a tax deduction
- Be realistic about the time and investment needed for evergreen donor programs and moment in time campaigns (aka lightning in a bottle)

## IMPACT INVESTMENTS

- Investors, individual or institutional, looking to create social good and their own financial gain
  - Kiva micro-finance turns small dollar individual donors into impact investors
  - Impact Assets Donor Advised Fund
  - Gates Foundation PRIs in global health
  - Omidyar's LLC is an impact investor for c4s
  - Recoverable grants
- Market size is over \$700B
- You look for an investment versus a grant when you are creating a rev gen stream that can pay the investment back
- Look for intermediaries that can help you find investors
  - Global Impact Investing Network
  - Impact Finance Center (pictured here)
  - Mission Investors Exchange

### Current & Upcoming Investor Clubs:



### Current and Upcoming Investor Accelerators/Giving Circles:





Photographer Credit: Brooke Anderson (left), Michelle Mush Lee (right)



*More is More*

Support Oakland Rising's political power building as we expand our organizing to year-round and beyond Oakland's flatlands into unincorporated Alameda County! We're partnering with some of Oakland's hottest artists and culture makers who are central to our movement to offer donors gifts. Help us reach our goal of raising \$15,000 by November 16, 2021.

**\$5,000 & Up**

Combination of three gifts from below

**\$2,500**

Combination of two gifts from below

**\$1,000**

Live Performance with Kev Choice & Jenn Johns

**\$500**

Choose from:

- \* Group dance class with Patricia Ong, Agasan Project
- \* Group Kimchi making class with liz suk

A print of original art piece from your choice of

**\$250**

- \* Ayodele Nzinga (*poem*)
- \* James Shields
- \* Shomari Smith
- \* Robert Trujillo

## EVENTS & EXPERIENCES

- Consider if the value proposition you can create with event-base revenue generation is worth the considerable effort it takes to run the event
- Every event requires different infrastructure (i.e. insurances, tech set up, etc.) so make sure you research the needs before committing to the tactic
- Virtual events are here to stay
- Events can be part of immediate return or larger gift cultivation strategy
- Can be a great way to show mission in action
- Consider embedding rev gen into existing mission event
- If the amount of money paid or a ticket is equal to or less than the fair market value of what is received by attending the event, then none of the ticket price can be considered a tax-deductible donation.



ABOUT

# IT'S TIME TO IGNITE A TRANSFORMATIONAL ERA THAT ENDS THE CLIMATE CRISIS THROUGH SUSTAINED DISRUPTIVE HUMANITARIANISM CENTERING RACIAL AND ECONOMIC JUSTICE.

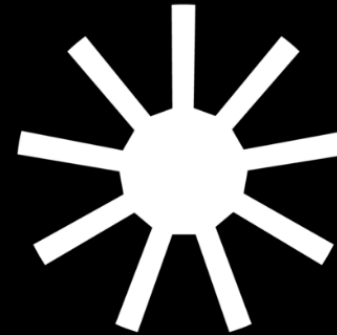
The climate crisis looms over every aspect of our lives today. And while there are many organizations working on climate change mitigation and adaptation, for the first time, Arm in Arm is putting forward a shared popular resistance strategy under which organizations and individuals of all ages can unite under a solidarity banner.

Arm in Arm believes that the solution is to ignite a transformational era that ends the climate crisis through sustained disruptive humanitarianism centering racial and economic justice.

Our model is centered around a set of principles that provide an alternative to the status quo and brings out the best in each of us with loving defiance. The movement calls on people to draw attention to systemic failures and injustice in their communities through civil, disobedient acts.

Millions of Americans will participate in coordinated work stoppages, mass boycotts and other peaceful acts of civil disobedience organized through a distributed, autonomous hubs and supporting organizations. From just transition to renewable energy and energy efficient affordable housing to good paying jobs and health care, we have a national platform that local hubs can adapt and implement.

Arm in arm, we will transform America and end the climate crisis. Are you with us? Text ARMINARM to 71777 to engage right now!



JOIN US →

- USCAN
- Embedding peer to peer commitment in volunteer organizing hubs
- P2P requires a lot of coaching for participants, so make sure staff has bandwidth and you can commitment to tool development
- Lots of tech platform options

First Name \*

Last Name \*

Email \*

Zip code \*

- I pledge to participate in acts of 'Disruptive Humanitarianism' and nonviolent civil disobedience (e.g. sit ins, blockades, trespassing) against corporate or government activities that are making the climate crisis worse through next summer of 2022.
- I pledge to support nonviolent civil disobedience through non-confrontational solidarity actions (e.g. text banking, phone banking, talking to my neighbors, planning for events) through next summer of 2022.
- I pledge to participate by donating and asking others to donate to Arm in Arm.
- I pledge to attend an Arm in Arm Intro Training!
- I pledge to vote for climate champions.
- I'd like to be kept in the loop for now.



## FEE FOR SERVICE

- “What do you get when you combine a Sazerac and a bioswale? New Orleans! The Water Collaborative offers fun, engaging, and informative tours year-round for tourists and locals. If you’re interested in the history of New Orleans regarding water, ecosystems, climate change, post disaster recovery, and politics, this is the tour for you. “
- Virtual bike tour and live walking tour sold through AirBnB Experiences
- Custom tours geared toward schools, conventions, etc.
- Make sure your pricing model is “all in” to determine scalability



SUBSCRIPTION

# JOBS WITH JUSTICE

Today is Labor Day, so what better time than to let you know about our brand-new zine? It's hot off the presses, and an incredible tribute to the power of our movement. Titled PTO (get it?), we hope this periodical will generate a space full of creativity and artistic expression within the labor movement.

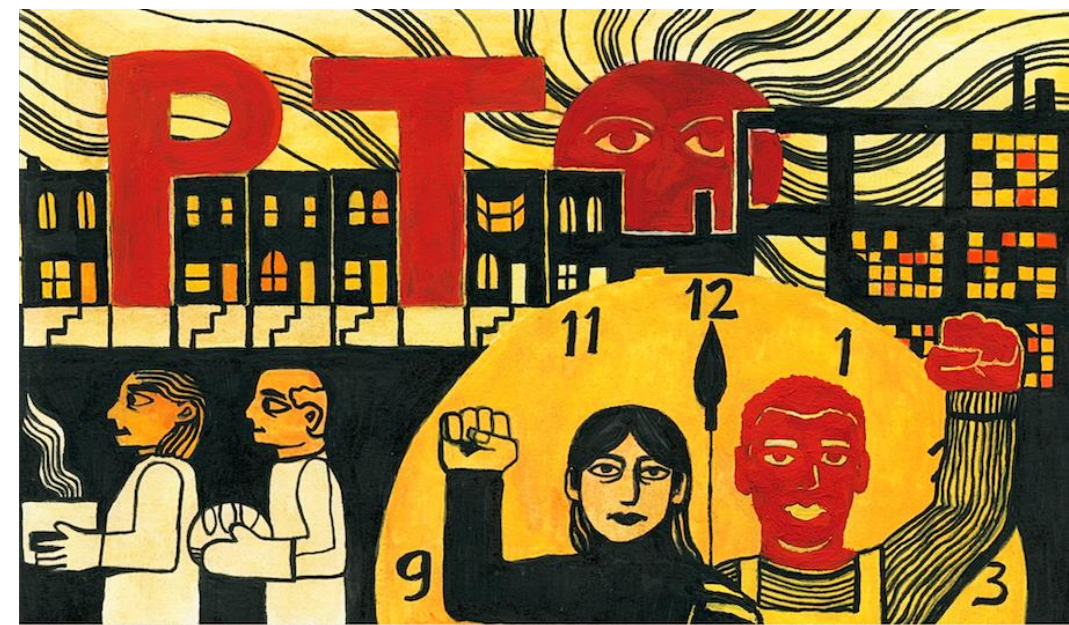
Our debut issue includes phenomenal submissions from artists, activists, and writers from around the country, demonstrating just some of the bold creative vision out there. As you thumb through the pages, you'll learn more about about the Jobs With Justice network, our cutting-edge campaigns, upcoming actions, and more.

Interested?

Good. Because we want you to be able to receive your own copy of *PTO* in the mail.

[If you make a donation of just \\$50 or more right now](#), we'll mail you a copy of the first issue of *PTO* and you're signed up for an annual subscription. Want to make it a monthly contribution? [Just \\$5 per month also gets you a copy](#) of the first issue of *PTO* and an annual subscription.

*PTO* is a fantastic way to learn more about our movement, the people who power it, the artists, creatives, and visionaries leading the way, and more. [So please, make a \\$50 contribution to Jobs With Justice right now \(or a minimum monthly contribution of \\$5 per month\)](#) and we'll send a copy of the debut issue of *PTO* directly to you and you're signed up to receive additional issues of *PTO* over the next year.



# JOBS WITH JUSTICE

**SUPPORTS WORKING PEOPLE.  
DO YOU?**

**PAID TIME OFF** is a call to see a world beyond capitalism, beyond grind culture, beyond the carceral state. These pages call us to celebrate and imagine that we are truly free. What if our liberation was not radical, but a fact of life? What would change if every day was Labor Day? What would stay the same? What would be the work you choose?

In our publication, we are joined by brilliant artists and cultural workers across the country who answered this call, who bravely offered their political imagination as a prayer for a new world. Paid Time Off is a space to see what is possible and how much of the future is already here. May this expression of freedom usher in more work that grows from abundance, not scarcity. And may it be the first of many.

Asé,  
MACKENZIE RIVER FOY  
Editor-in-Chief, Village X Magazine  
Creative Content Producer, Jobs With Justice

**WHY  
PTO?  
WHY  
NOW?**

## CONTENTS

SEPTEMBER 2021

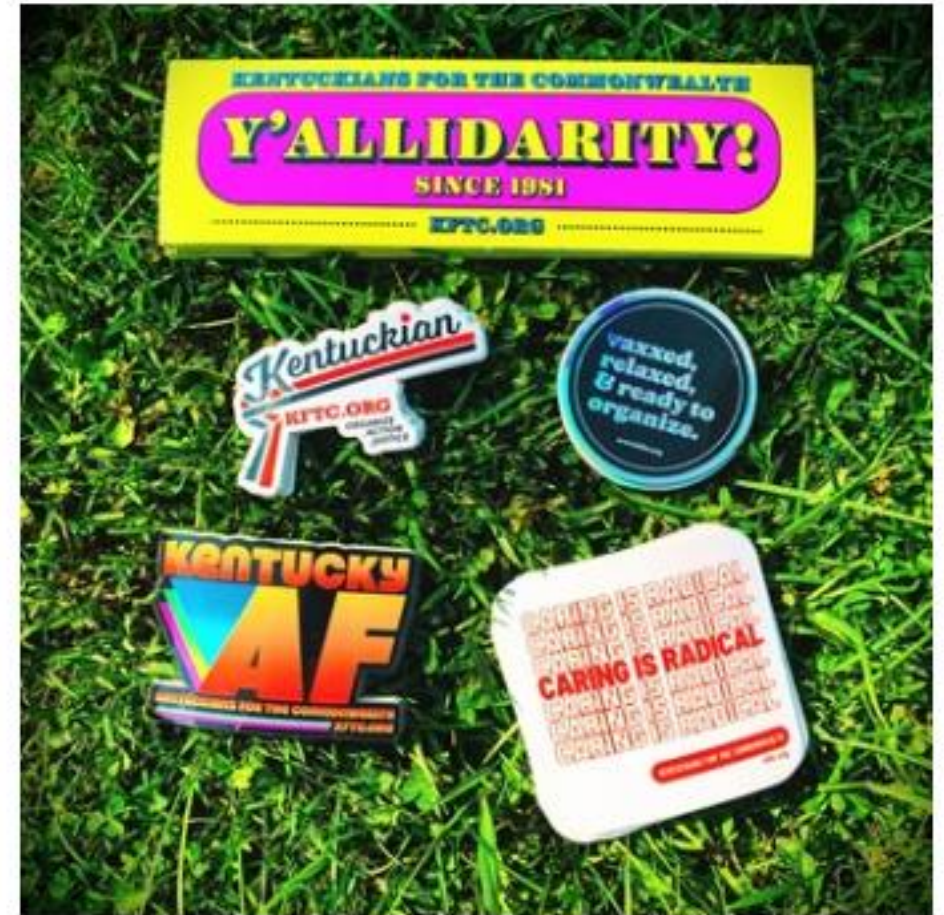
WHY PTO? WHY NOW?	7
RIGHT LIVELIHOOD & HERBED BREAD BY DAN THOMAS	8
DID YOU DO THE READING?	10
WE SEE YOU AN INTERVIEW WITH ANA TORRES FOR GOLDENROD JOBS WITH JUSTICE	12
JUNE BREAK BY KAREL PHILLIPS	14
AFTER JOHNNIE TILLMON BY MORGAN WITTEP	16
RADICAL VISION JOURNEMILLER STRATEGIES	18
WE ARE ALWAYS ESSENTIAL BY JILL TRACY FOR THE FUTURE LAB	19
LINK UP! TAKE ACTION	22
DREAMS, INHERITED BY ANITA MARY	24
JAMS WITH JUSTICE	30



Ernesto Yerena "We Are Human" Poster  
Evolution Bandana

\$25.00

National Day Laborers Organizing Network



Sticker Pack!

\$15.00

Kentuckians for the Commonwealth

## OTHER REVENUE STREAMS

### Unrelated Business Income

- Produced by an income generating activity that is not primarily related to why you're tax exempt.
- Anything more than \$1K in UBI is subject to business income tax
- Good example is you rent part of the office space you own to pay down your mortgage
- Tax exemption risk exists if the IRS decides that your staff is spending too much time on UBI activities.
- Often why nonprofits create for-profit subsidiaries

### For-Profit Subsidiaries

- After tax profits benefit the nonprofit which can then deploy them to advance its mission
- The business might or might not directly advance the nonprofit's mission (i.e a for-profit that rents your office space versus Mozilla Foundation creating Mozilla Corporation)
- Lots of regulations at state level governing if nonprofit can acquire or invest in starting a for-profit so check with counsel before considering this

# POLL

(open [menti.com](https://www.menti.com),  
4186 9779)

**WHAT TYPES OF INDEPENDENT REVENUE  
ARE YOU ORGANIZING & MOBILIZING TO  
BUILD POWER?**

**FOR YOUR C3 - GO.**

# POLL

(open [menti.com](https://www.menti.com),  
4186 9779)

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**POLL**

**HOW DO YOU DECIDE WHAT REV GEN  
MODELS TO PURSUE?**

**GO.**



# Mobilizing Money

Designing the Rev Gen Model  
Mix That's Right  
for Your Group ●

## Check Point

### Entity Check

### Staff Bandwidth & Leadership Buy In Check

### Staff Skillset/ Training Check

### Investment Check

### Volunteer Capacity & Skillset/Training Check

## Why It Matters

01

Your legal structure and where you sit on the systemic change spectrum, both in what you do and where you do it, changes what rev gen will work for you.

02

“If you build it, they will come” said no fundraiser ever. Rev gen takes “hands on keys” time and staff have to be given that bandwidth from leadership.

03

If you don't have development staff, you have to lean into rev gen that leverages the skillsets your staff has or can be easily trained on.

04

Invest money to make money. If you don't have a budget for rev gen, start small and find capacity building partners.

05

Volunteer leaders can be tremendous rev gen partners. Think board and advisory councils getting you into corporations.



*"Relational organizing is the best way to get someone to do something. That's why it's core to our organizing model.*

*Progressive Multiplier has helped us take one of the most effective state-based relational organizing programs in the country into one of the most effective relational fundraising programs.*

*This year alone we're on track to receive over 15,000 donations with an average gift of \$64."*

*JONATHAN BIX  
Executive Director,  
For The Many*



## The Goal:

Increase unrestricted revenue to build power in New York's marginalized communities beyond the Hudson Valley through community organizing, civic engagement, and leadership development.



## The Hypothesis:

By increasing investment in their relational fundraising program from \$30K to \$55K annually, return on investment will remain constant and unrestricted revenue will increase from \$386K to \$731K.



## The Experiment:

For the Many is testing a 30% increase in staff support of the program and double the amount of outreach to fundraisers. These efforts will culminate in 2 one-week relational fundraising drives conducted through a snowflake model, leaning heavily into volunteers' organizing skills.



## The Outcome:

Expected year over year increase in revenue of \$344,852 from \$25K Test Grant

Program on a trajectory to be a \$1M annual source of unrestricted revenue by 2024, sooner with a Scale Grant

**The Multiplier Effect: On track to achieve 13:1 ROI**





# Lessons Learned

## About Progressive Rev Gen

## Did you learn that...

- Rev gen for power building groups can be hard because it doesn't align with traditional donor motivation/expectations as influenced by white supremacy culture?
- Rev gen can be an integral part of your mobilizing and organizing efforts?
- Knowing how to be c4 first in independent rev gen and to leverage c3 funds to optimize the use of c4 funds are critical parts of rev gen for power building multi-entity groups?
- There are many, many ways to raise revenue?
- But you should only pick the ones that align to your reality and strengths?
- This rev gen stuff can be complicated, and you should always reach out to your counsel, auditor, etc. for guidance?



# Homework

Thank you!!!

Please contact me with questions about rev gen or about Progressive Multiplier grant opportunities.

[bethany@progressivemultiplier.fund](mailto:bethany@progressivemultiplier.fund)

- 1) Please fill out the survey to let us know what you thought of this webinar.  
(link in chat:  
<https://forms.gle/VMmw6iXSKLs2WxJm9>)
- 2) Look in your email for the results of our poll questions AND an extra resource or two to help with your rev gen journey.
- 3) Register for the next webinar in the Base Power Learning Series “Membership & Data: Do you have consent for that?”:  
<https://www.newleftaccelerator.org/events>