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An Allegiance Group + Pursuant Resource

Breakthrough Fundraising

A New Path to Achieving
the Impossible

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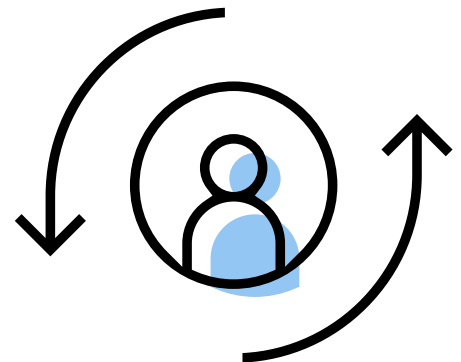
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Introduction

At Allegiance Group + Pursuant, we've worked with hundreds of nonprofit organizations. Our clients touch all segments of the nonprofit space, from healthcare and public media to universities and arts and culture. **Despite the differences in how they operate, we see one common thread throughout these organizations: fundraisers are repeatedly asked — and expected — to do more with less.**

This challenge has become an epidemic across the nonprofit space. It's so ingrained in our culture that we hardly question it. And yet, the resulting burnout is driving many fundraisers out the door.

Over the last five years, several alarming statistics point to just how dire the situation has become. For instance, one [survey from Nonprofit HR](#) found that 45% of nonprofit employees said they plan to look for new or different employment in the next five years. Of that group, 23% said they won't pursue work at another nonprofit. **Another study from ExactHire.com found the annual turnover rate among nonprofits to be 19% — well above the industry average of 12%.**



19%

Nonprofit
turnover rate

Clearly, doing more with less isn't sustainable. In our work, we've seen a fundamental fracture in how fundraisers are tasked with achieving outcomes in their organizations. To combat this, we've adopted the breakthrough concept to help fundraisers and marketers feel less oppressed and more empowered.

In the for-profit space, the Breakthrough concept enables workers to step back and examine the barriers to their success — namely, their team's mindset. A shift from conventional thinking to so-called Breakthrough thinking can fast-track change within a company and yield giant leaps in development.

When you apply Breakthrough to fundraising, what barriers could be demolished? How many teams could be strengthened? How many lives could be changed?

We've used the Breakthrough practice in our work with organizations to equip them to transform their cultures. In doing so, we have aligned their passion and inspiration for their mission with the ambitious outcomes that stand before them.

This paper synthesizes the core principles of Breakthrough. We hope that you will be challenged and inspired to break through the barriers holding your team back.

An Introduction to Breakthrough

A New Path to Achieving the Impossible

“It always seems impossible until it’s done.”

— Nelson Mandela

Before you invest your time in reading this series on **Breakthrough Fundraising**, we encourage you to first confirm that the following two statements apply to you as a nonprofit leader:

- » I believe that changing the world is possible.
- » I have a vision for the future, and I’m compelled to make this vision a reality.

Still with us? Great, because you could be doing a number of things professionally, and the fact that you’ve chosen a career in nonprofit development means you are empowered to change lives, transform society, and make this world a better place. So, let’s get started.

What Is Breakthrough Fundraising?

At Allegiance Group + Pursuant, we believe that nonprofit leaders are uniquely equipped to change the world, and we’ve experienced firsthand the powerful impact that comes when those leaders apply Breakthrough.

We first learned the idea of Breakthrough from our friends at [Gap International](#)[®]. The smart people at Gap International have spent the past four decades helping leaders transform the performance of their organizations from the expected to the extraordinary. They do this by

guiding leaders to first understand and then challenge their mindset. In identifying how our current perceptions affect our current actions, we gain insights into the otherwise invisible obstacles that might be holding us back. In partnership with Gap International, we are charting a path to ensure that more leaders are successful in changing the world by taking this powerful approach and applying it to fundraising.

We've had the opportunity to work alongside nonprofit leaders at some of the nation's most diverse organizations, including world-renowned healthcare foundations, universities, faith-based ministries, and multi-affiliate organizations. This collective experience gives us a unique understanding of the challenges facing nonprofit leaders today, such as limited resources, increased competition, elevated donor expectations, high staff turnover, and an expectation for annualized ROI — and those are just the ones off the top of our head. Changing the world may not be impossible, but some days it feels like it. Allegiance Group + Pursuant and Gap International have partnered to produce this resource and in-person workshops, which will:

- » Demonstrate how **Breakthrough** Thinking can help you solve the challenges facing your organization.
- » Equip you to set a **Breakthrough** outcome that ensures you reach far enough to achieve the seemingly unachievable.
- » Ensure that you define a personal stand for how you will impact your organization's ability to achieve **Breakthrough**.

Embracing and applying this practice won't be easy — nothing worth doing ever is. But we know that the practice of Breakthrough can revolutionize your organization for the better, and we believe your mission is worth it.

There has never been a better time to apply Breakthrough to your work, and we are excited to get started!

Adopting a Breakthrough Mindset

A New Way of Thinking Is No Longer an Option

“If you think you can, you’re right. If you think you can’t, you’re right.”

— Henry Ford

Because you are a nonprofit leader, the work you do is rewarding, but that doesn’t mean it’s easy. The challenges you face in today’s increasingly competitive landscape can make the outcomes you’re tasked with achieving feel unachievable. Fortunately, history is filled with examples of leaders just like you — leaders who solve new and complex challenges to improve results.

So, what drives leaders to find these solutions? Oftentimes they are driven by a crisis. In Breakthrough, we embrace crisis because it’s a state that inspires new ways of thinking. Rationally, we know that we cannot continue down the same path and expect to arrive at a different destination; however, it often takes a crisis for us to stop and change our course. The question is, can we adapt and change course without being in crisis? The answer is yes, and the solution is found in our thinking.

A New Way of Thinking Is No Longer an Option

Before you can make a change, you have to recognize the need for change. You must acknowledge that what worked in the past isn’t working sufficiently today. You must be committed to change before your actions can evolve. **This is why Breakthrough starts with examining our mindset.**

The first step toward Breakthrough is found in our mindsets. Sound fluffy? Trust us, it’s far from it. Our mindset is the most powerful tool we have. It informs what we believe is possible, impossible, and how we build a path to

achieve it. Our mindsets are inherently informed by our experiences, and sometimes that information can stifle our progress. Mindsets are critical to creating any new reality.

So let's start examining our mindset with an exercise. Take a step back and give your organization an honest assessment. Ask yourself two questions:

1. What haven't we accomplished in the past 3 to 5 years that we thought we would?
2. What are we doing today that we've been doing for the past 3 to 5 years that still isn't having the intended impact?

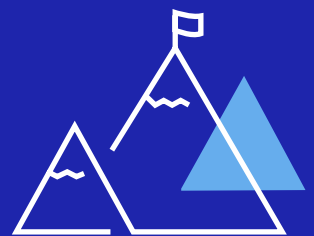
Write down your answers, and try to be as specific as you can. Got them? Great.

Now, examine your answers and be aware of what you wrote down as your mindset.

The things you think and feel when you reflect on these answers are windows into what you are thinking, and how it is impacting your choices for the future. By **examining your mindset**, you begin to identify the narratives that, while well intended, may be holding you back.

Let's look at an example:

Organization ABC has been tasked with doubling revenue in three years to support a new initiative. This goal was set by the board without input from the development team and was based on the need of the new initiative, not the historical fundraising performance of the organization.



Our guess is that you can relate to this scenario. So stop, reflect on a time that you were in a similar scenario, then write down all the things you're telling yourself about that situation.

Did you write it down? Were any of the following on your list?

- » We can never achieve that goal; it is totally unrealistic.
- » We don't have the resources needed to double revenue.
- » The board doesn't understand our current fundraising environment or our donors.
- » Two organizations in our community are in campaigns and are cannibalizing all the wealth.

Although we think of these things as informed facts, they are actually just our current mindset. They are what we are telling ourselves about our current reality. In order to achieve success in the scenario, we have to acknowledge and then challenge the way we think — only then can we achieve Breakthrough. So let's try it.

Now, take the same scenario:

1. Put the following phrase in front of each item on your list: "What would it take to..."

Example: What would it take to achieve the goal? Or, what would it take to get the resources we need to double revenue?

In taking this approach, you'll build the skill of shifting your focus from the rationale for why the scenario is impossible to imagining a new reality that will allow it to be possible (Breakthrough).

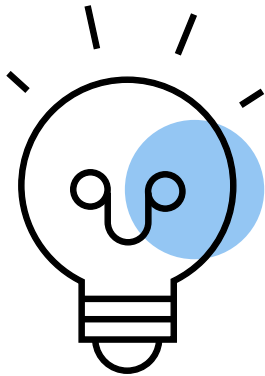
2. Ask yourself what you're thinking but not saying: "What is not on our list?"

Example: I don't trust my leadership will stay focused on this goal, so why should I even start? Or, I'd have to fire John and he's a good friend.

We all have the little voice in our head that thinks what we may be afraid to say. Oftentimes, the things we are thinking but not saying are the biggest obstacles in our way. Simply acknowledging them helps us solve them.

Greatness requires bold and uncompromising leadership. We hope you are a bold and uncompromising leader, and we invite you to join us in creating a new path forward for your organization by adopting Breakthrough.

Over the next few days, try to elevate awareness of your mindset because it will be essential to the next piece in the series — Setting a Breakthrough Goal.



Breakthrough Questions:

An amazing thing happens when we embrace change: the world opens up. Passion and enthusiasm build. All that weight that once held us back gets lifted from our shoulders.

Here are some questions to help you take the first steps toward adopting a Breakthrough mentality for your organization:

- » What are some limiting beliefs you've had about the way your fundraising efforts are implemented? (Think about times when you've said, "We could try that, but _____.")
- » What issues are getting in the way of truly achieving the impossible (limiting beliefs, people, processes, etc.)? What is one step you can take to address those issues?
- » What is the cost of not changing the way you think about these issues?

Setting a Breakthrough Goal

If It Feels Achievable, Reach Further

“High achievement always takes place in the framework of high expectation.”

— Charles Kettering

Every day you set forth on a path to achieve the seemingly unachievable. You work tirelessly to raise the funds needed to feed the hungry, treat the sick, provide an education to all, and restore humanity. You live in a place where **hope** is the currency and **impossibility** is the commodity. You committed to this journey as a bold and uncompromising leader.

How do we know this? Because you affirmed that the following two statements apply to you:

- » I believe that changing the world is possible.
- » I have a vision for the future, and I’m compelled to make this vision a reality.

You studied the fundamentals of Breakthrough and began your journey to embrace it as a practiced skill.

You continued the journey and began to **think about your thinking**. You explored a new mindset that viewed challenges through the lens of what is possible and created solutions by asking, **“What will it take to...”** You developed awareness for how your thinking may be limiting your success and invested in time to see how your current thinking was impacting your current actions.

Setting A Breakthrough Goal

Now let's set your **Breakthrough Goal**. To start, we must first define it. A **Breakthrough Goal** is not just a WIG (wildly important goal) or a BHAG (big, hairy, audacious goal), it is something bigger than that. It is something that feels totally and utterly out of our reach. You'll know your goal is Breakthrough when it makes you feel both excited and uncomfortable at the same time.

To help you get started, think about something in your organization that inspires you: a mission outcome, a financial milestone, or a future state. Then ask yourself two questions:

1. Does this feel achievable?
2. Can I define the path to achieving it?

If the answer to either of those questions is yes, then reach a little further. Increase it, accelerate it, or expand it. In the end, your Breakthrough Goal should be so meaningful that it establishes an artificial emergency in your business — in your mind, that is. Your goal should inspire a reality that feels nearly impossible to achieve.

As you reach far in establishing your Breakthrough Goal, take comfort when you start to sense it is creating an artificial emergency. That artificial emergency will pull you away from the status quo and lead you to ask, "What will it take to make this happen?"

To help you set your Breakthrough Goal, start by stating a reality that would change the paradigm for the constituency you serve. Write down what that reality looks and feels like. Write specific attributes defining the reality. Below are a few examples to help:

- » We are helping more women have access to mammograms.
- » We have a collaborative executive leadership team.
- » We are getting more people to fundraise for the walk.
- » We have stopped supporting the volunteer-led social event that runs at a net loss.
- » We are providing more food to families in the community.

These are great and powerful realities — ones all of us would all be proud to achieve — but they aren't quite Breakthrough. To get them there, we need to add a few elements. In order to turn these powerful realities into Breakthrough Goals, they must be specific, measurable, require a leap because they are not predictable, and they must open up new futures that cause you to grow. And here's one more — **it should be stated as if it has already been accomplished**. The first two probably don't surprise you. But the last one — stated as if it has already been accomplished — is likely new, and is critical to Breakthrough. See, in Breakthrough, there is no **if** or **maybe** — there only **is**. So, let's try it. If we take those same realities and turn them into Breakthrough Goals, they might look something like this:

- » The 250,000 female residents of Chicago's Will County, 45 years and older, received mammograms thanks to the addition of two new screening clinics.
- » Our Executive Leadership Team collaborated on the priorities stated in the strategic plan which accelerated our timeline by 50%.
- » All participants in the NYC walk made a personal donation or actively fundraised at least \$1 from their networks, which resulted in 50% more revenue.
- » We stopped providing resources and staff support for more than 24 volunteer-led social events, resulting in a net gain of 150%.
- » All families in the California Bay Area had access to enough nutritious food to support their health and well-being.

Are you starting to get the hang of it? If you want to take it even a step further, add "because of me....." in front of your Breakthrough Goal.

Developing a Breakthrough Goal is likely more natural for us as philanthropic leaders because we spend our days combating diminishing results in the midst of increased expectation and competition. To push yourself to reach to the highest expectation you can, set a Breakthrough Goal that will deepen your commitment and remind you of the bold leader you aspired to be on the very first day at your organization. A powerful Breakthrough Goal is essential to the fourth and final piece in the series; creating the growth needed in your leadership stand.



Breakthrough Questions:

As you look to create your Breakthrough Goal, here are a few questions to consider:

- » What is your mission or vision statement and what would it mean to expand it or accelerate the timeline to achieve it?
- » What outcome would truly change the landscape for your constituency?
- » What crazy ideas have been shared by your board? Your volunteers? Your constituents?
- » Can you measure your Breakthrough Goal, and is it specific?
- » Does your goal, when stated as something that has already been accomplished, make you both terrified and inspired?

Your Breakthrough Stand

The Leader You Are, and the Leader You Need to Become

**“You stand for what you tolerate.”
— Unknown**

As a nonprofit professional, you are well-equipped to lead. You have become skilled in the art of building deep and meaningful relationships with donors and volunteers. You are proficient in fostering collaboration across departments, boards, committees, and constituencies. And, perhaps most notable of all, you continually prove that it is possible to drive growth with the same, or even fewer resources year after year. You are an extraordinary leader.

As an extraordinary leader, you appreciate that leaders are not born, they are fostered. And leadership is not given, it is earned. So, it will come as no surprise to you, that the fourth and final part in our series on Breakthrough Fundraising is focused on your leadership.

In part one, you committed to embracing Breakthrough Fundraising and to achieving a vision that feels unachievable. You created a mindset, by thinking about your thinking to establish a framework of possibility. You defined a Breakthrough Goal and stretched yourself by committing to an outcome that felt both inspiring and terrifying. Now, it's time to examine your leadership and create your Breakthrough Leadership Stand.

Creating Your Leadership Stand

To achieve a goal that is truly Breakthrough, you will need a clear and unwavering commitment. Your clarity and commitment will serve as your

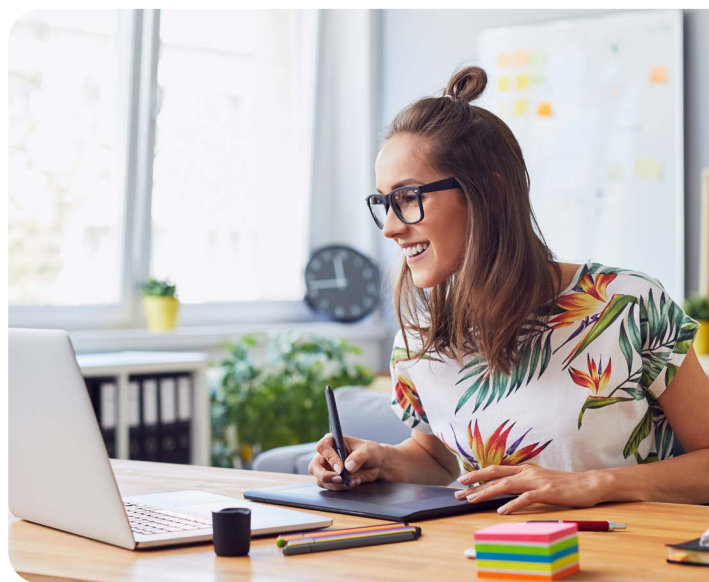
foundation, allowing you stay the course no matter what you encounter along the way. We define this foundation as your Breakthrough Leadership Stand, and like most things in Breakthrough, creating it will cause you to stretch.

While it may seem counterintuitive, your Breakthrough Leadership Stand is not a description of who you are today as a leader. It does not celebrate your strengths, acknowledge your accomplishments, or list your natural gifts. Quite the opposite. Your Breakthrough Leadership Stand moves beyond the leader you are today to establish the leader you need to be to achieve Breakthrough.

By definition, your Breakthrough Leadership Stand must describe a future version of you — something that causes you to stretch outside of your current leadership. It must align with your Breakthrough Goal and position you to effectively address the thinking and obstacles that may be preventing your success. It must be clear and succinct and start with the phrase “I am...”

To develop your Breakthrough Leadership Stand, let's start by examining your Breakthrough Goal. Take a minute to read it. Say it out loud in a clear and committed voice. As you say it, be aware of the thinking that starts to develop. Specifically, look for the areas of caution, fear, and hesitation that quickly come into your mindset. Write those down. As you reflect on them, examine how your current actions are enabling behaviors in yourself and others that may be hindering your ability to achieve your Breakthrough Goal. Then ask yourself two questions:

- 1. What am I tolerating that is hindering my success?**
- 2. What would my leadership look like if I did not tolerate this?**



In answering these questions, consider your current actions, be aware of your current thinking, and study those two things in connection to the future state of having achieved your Breakthrough Goal. You will know your leadership stand is Breakthrough when it feels both unfamiliar and inspiring at the same time.

As a first step to creating your Breakthrough Leadership Stand, write the attributes, in yourself and others, that you tolerate. Below are a few examples to help you get started:

- » Acquiesces based on seniority not expertise
- » Enables decision by consensus
- » Retains staff who continually underperform
- » Celebrates sole contributors who work in isolation of the team
- » Fears failure

These are powerful attributes, and while they may produce results, they can also contribute to stagnation and limit Breakthrough. Take a minute to review the list of attributes you tolerate. You'll likely find that whether good or bad, they are intrinsically tied to your current reality, a reality that you're looking to break through.

So, let's flip them. Let's see what it would look like to be a leader that did not tolerate these attributes, and instead takes a stand for Breakthrough. We'll use the same examples from above to help you get started:

- » Confidently contributes insights and expertise in all settings
- » Collects input to inform a decision that is clear and decisive
- » Holds staff accountable for work product and performance
- » Fosters collaboration to leverage complementary skills across the team
- » Accepts that fear of failure will happen, so fails fast and forward

When you pivot your leadership from who you are today, to who you need to be to achieve your Breakthrough Goal, you create an opportunity for possibility. You open your thinking to a new reality. When practiced consistently, you will experience a growth in your own leadership that positions you to achieve your Breakthrough Goal.

Having explored the thinking that drives your leadership, and assuming you're ready to grow in your leadership, it's time to create your own personal Breakthrough Leadership Stand. As a reminder, your Breakthrough Leadership Stand must:

- » Describe a stretch in your current leadership
- » Position you to effectively address thinking and obstacles that limit success
- » Be clear and succinct
- » Start with the phrase "I am..."

Below are a few sample Breakthrough Leadership Stands that we hope inspire you in establishing your own:

- » I am a bold and decisive driver.
- » I am patient and accepting.
- » I am a rock in times of growth and change.
- » I am an outspoken and confident member of the executive team.
- » I am an inspiration in times of uncertainty.
- » I am trusting, present, and unconditionally empowering.

As you read these, you will notice that many are in direct opposition to one another. That is intentional as each organization and each Breakthrough Goal will require a different type of leader. There is no right or wrong — merely levels of growth. So, stretch yourself to be the exact leader you need to be to change the world by turning your vision into a reality.



Breakthrough Questions:

As you look to create your Breakthrough Leadership Stand, here are questions to consider:

- » What attributes do you tolerate?
- » What kind of leader does not tolerate those attributes?
- » What kind of leader are you?
- » What kind of leader do you need to be to achieve your Breakthrough Goal?

Conclusion

Now that we've explored the process of breakthrough, you should have a clear picture of the kind of leader you need to be to change the world and turn your vision into a reality. You've already made such incredible progress. You continually prove that it is possible to drive growth with the same, or even fewer, resources year after year.

In Chapter One, you committed to embracing Breakthrough Fundraising and to achieving a vision that feels unachievable. In Chapter Two, you created a mindset, by thinking about your thinking to establish a framework of possibility. In Chapter Three, you defined a Breakthrough Goal and stretched yourself by committing to an outcome that felt both inspiring and terrifying. And in Chapter Four you examined your leadership and created your Breakthrough Leadership Stand.

As you've explored the impact of your thinking and you've created your Leadership Stand, you've exposed obstacles. **You've grown as a leader. The challenges are vast, but so is the potential for breakthrough. The possibilities are palpable. It's time to break through and achieve great outcomes.**



More about **Allegiance Group + Pursuant**



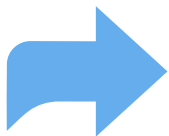
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We'd love to connect to learn more about your mission and the goals we can help you achieve.
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