



Case Study: Teens of Color Abroad

During 2020–21, Parkes Philanthropy project team implemented a strategic development strategy for a nonprofit organization, Teens of Color (Abroad). The team established financial pillars in order for their organization to sustainably grow, such as donor pipeline, engagement strategy, and long-term operational planning. In order to devise and organize a sustainable approach for fundraising and grow an organization, there must be key pillars in place through strategic planning – such as, short- and long-term goals (internal and external), capacity assessment, clear programming and content, financial planning, and evaluating past performance. Strategic planning begins not at the current context and rather, delineating the past to the present and vision for the future. This presents an opportunity to leverage the opportunities to strengthen areas of need and continue what is working in order to develop a sustainable plan for growth and for the organization to meet goals.

CLIENT CONTEXT

Mission

TOCA's mission is to cultivate the next generation of globally conscious youth of color through language immersion study abroad experiences. TOCA has served over 400 students of color, sponsored 20 U.S. passports for study abroad programming, and awarded \$30,000 in scholarships.

Situation

After two years of operating, TOCA was ready to double their student cohorts, and needed to establish a pipeline and a sustainable fundraising strategy. On the brink of establishing themselves as a 501(c)(3) and hire staff, TOCA needed Parkes Philanthropy to shape and plan their fundraising strategy and consultation on which pieces of their organization need codification in order to position themselves for their growth phase.

Analysis

The project team conducted an analysis of key areas of the organization's finances, fundraising strategy, and programming content. From this analysis the team uncovered three key levers in assessing the approach and foci areas for strategic development. The following organizational conditions contributed to Parkes Philanthropy strategy:

- 1. Financial plans:** Without scaling models aligned with budget needs forecasted, the organization could not fundraise strategically and aligned to goals. Aligning to true financial forecasts and goals was needed to understand how success would be measured.
- 2. Donor and fundraising history:** After assessing that donations have been small individual donations via fundraisers, there was a need to secure a high-net-worth donor pipeline. There was a strong fundraising event and communication plan in place, meaning there would be a focus on establishing the client's Including this, the organization's CEO needed a toolset, guidance, and engagement plan in order to independently message, talk to, and secure donations.
- 3. Nonprofit status:** Due to the organization having a fiscal sponsor and not established as a 501(c)(3), grant application and pipeline preparation can support their capacity to scale. Establishing grant applications can also establish key infrastructure for the organization to grow, such as evaluation plan and metrics, budget, and content.

Solutions and Outcomes

After working with the client to conduct the analysis of the organizational conditions and shaping the strategic plan, the project team established the following in order to successfully achieve the client goals.

| SOLUTION 1 High-net-worth donor pipeline | SOLUTION 2 Donor plan and engagement toolkit | SOLUTION 1 Grant proposals and pipeline |
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| <p>Devised donor pipeline of over \$300,000 value: Developed donor criteria and categories based on net worth, response rate testing, and alignment to organization based on historical donations.</p> | <p>Engagement with and on behalf of organization: Pre-briefed and coached CEO with briefing template, strategy, and messaging. Engaged with donors on behalf of CEO. message follow-ups – for client.</p> | <p>Curated \$200,000 grant prospect list: Created and researched grant prospect list based on organization’s mission and scaling focus. Provided key briefs of top grants to support client in writing future grants – criteria, program officer, deadlines, materials to be submitted.</p> |
| <p>Strategic planning: Created and revised the organization’s strategic plan, creating giving levels, marketing and communication strategy.</p> | <p>>150 HNW donor outreach and >30 HNW donor calls: Established and revised top 50 funders based on continual solicitation testing.</p> | <p>Submitted \$100,000 of grant proposals: Created evaluation plan, supported budget forecasting for scaling, and proposal strategy aligned with the funder’s criteria.</p> |
| <p>Donor progress tool: Provided donor progress tracking tool aligned with prospect protocol strategy.</p> | <p>Prospecting Toolkit: Created engagement protocol by engaging 10 donors at a time and follow-up strategy. Created and tested prospect toolkit – templates, donor briefing documents for calls, and best practices.</p> | <p>Engaged with program officers: As proxy to the organization with program officers for grants such as Bank of America, Costco, and mid-size foundations.</p> |

"TOCA is now connected to people and communities that are aligned with our mission and vision. This is just the beginning of those relationships, so I know that they will blossom in the very near future."

–Lamar Shambley, CEO/Founder of TOCA