

The FIRE Journey: Ford Foundation BUILD cohorts and the outlook so far

Mona Younis, Ph.D., Evaluation Consultant

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Spring is a future-forward organization that supports and accompanies social and climate justice leaders in accelerating their individual and collective capacities to solve the critical problems of our time. Spring operates as a remote-first social enterprise which consists of a dynamic, transdisciplinary, global team of associates. For over 15 years, they have been creating transformative programs, processes, strategies, and tools that respond to the needs of clients and help them make leaps of leadership in their communities, organizations, networks and society at large.

Spring currently offers programs that support change-makers to thrive in complexity, gain fresh perspectives and forge powerful new alliances and pathways: these include High Impact facilitation, coaching and FIRE (Financial Innovation and Resilience) programs. Spring's customized programs build on the unique strengths and potential of individuals, organizations, and networks at any given stage of development. See www.springstrategies.org for more information.

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We value the different perspectives, backgrounds and experiences that make each person unique. This includes but is not limited to an individual's race, ethnicity, gender identity and expression, age, class, religion, disability, and sexual orientation. We believe that it takes a wide diversity of perspectives, experiences, and ways of working for any group to successfully navigate complexity, address systemic causes of oppression and contribute to a more just and life sustaining future. The Spring team is a diverse group of people based in different parts of the world. We work with social and climate justice advocates and leaders globally through processes in which diversity and interconnectedness inform and drive meaningful collaboration and impact.

Mona Younis is an evaluation consultant who specializes in human rights. A sociologist by training, Mona's interest in evaluation began with social movements for justice as a participant, observer, and student. The desire to understand how social movements work and when they succeed motivated her doctoral research at the University of California, Berkeley. Since then, she has consulted on and written about organizations and movements for social and economic justice, and co-founded organizations that fund human rights in the U.S. and around the world. She is based in Washington, DC; her native language is English and she also speaks Arabic and French.

<https://www.monayounis.com>

TABLE OF CONTENTS

OVERVIEW OF KEY FINDINGS	4
1.0 BACKGROUND	6
2.0 THE FIRE JOURNEY	8
2.1 Embarking on the Journey	8
2.2 The Journey Begins	10
2.2.1 All Cohorts	10
2.2.2 Brazil	23
2.2.3 Indonesia	30
2.2.4 MENA	39
2.2.5 Southern Africa	46
2.3 Keeping Momentum	53
3.0 LEARNINGS	56
4.0 APPENDICES	58
A. FIRE Framework	58
B. Change Domains	59
C. Materials reviewed	59
D. FIRE Claims	61
E. Cohort Details	64
F. Diagnostic	64
G. Cohort FIRE Program Details	65

Overview of Key Findings

This report examines the FIRE experience of 46 organizations and networks from Ford Foundation BUILD cohorts in four regions who underwent the FIRE training program between December 2019 and May 2021:

- | | |
|---------------------------------------|------------------|
| • Brazil | 14 organizations |
| • Indonesia | 13 organizations |
| • Middle East and North Africa (MENA) | 8 organizations |
| • Southern Africa | 11 organizations |

The report discusses research findings drawn from a mixed method approach that combined: FIRE financial health indicators; survey data; observation; and a desk review of FIRE materials.

Across the four cohorts, FIRE participants expressed overwhelming satisfaction with the FIRE program: every respondent indicated that the program had either met or exceeded their expectations, and every respondent noted that they would recommend the program to others.

The report, however, focuses on identifying where the FIRE program results in organizational change. It focuses on the three facets of change critical to financial health and sustainability: these are Attitude, Practice, and Outcomes. The research findings confirm that the FIRE program demonstrates clear and important impact on all three fronts.

Attitude: At the conclusion of the program, respondents exhibited high levels of confidence and optimism regarding their organization's prospects for building and maintaining greater financial health and resilience. On a 10-point scale, the four cohorts together assigned an average rating of 7.9 points. Moreover, every respondent but one expressed the belief that the FIRE program will enable their organization to have greater impact in the future. Regarding resource mobilization, 100% of respondents indicated that they now communicate more confidently with donors; and over two-thirds believe their participation in FIRE will enable them to reduce their dependence on Ford Foundation funding in the future.

Practice: There has been significant activity on the part of FIRE participants, even while the program was in process. Participants have updated or created key financial and organizational policies, plans and practices: many that did not have these prior to FIRE have now implemented them and others have updated or improved what they already had in place. Respondents have also made important strides in improving and pursuing a range of new resource-generating strategies. The majority of respondents who have tried new strategies to diversify their sources of income attribute their success to FIRE learnings. In the area of donor relations, there is notable progress: many participants shared that they are both asking for what their organizations need and are raising broader issues related to the requirements of their field of work. Such discussions and negotiations are key to long-term transformations of the funding ecosystem.

Outcomes: FIRE participants attributed a number of important achievements to FIRE. The majority (82%) report progress of some kind in relation to capital reserves, including developing, expanding, or contributing to their reserve fund. A significant percentage of those who have tried new revenue-generating strategies have done so with success and over half (54%) report having already raised new funds as a result of FIRE. Participants reported changes that include new and consequential ways of working, internal cohesion and shared responsibility, among other things that place them on firmer ground as they continue to build their financial health and resilience.

Participating organizations in every cohort have plans to pursue new revenue-generating strategies in the near future. Most respondents have set up internal processes to ensure that FIRE learning continues and is shared, built upon, and carried forward.

The FIRE program is demonstrably flexible and meets all participants where they are. Despite considerable diversity both within and across the cohorts, no patterns were discerned. Although the sample size is small, the findings do suggest that organizations irrespective of age, size or income can and do benefit from FIRE. However, as one might expect the cohorts that started earlier, and thus had more time to apply FIRE learnings, have made greater strides in their FIRE journey.

Finally, each organization's FIRE journey is unique, depending on their starting point and the terrain in which they operate. Not all will arrive at the same place or at the same time, but all have a much greater opportunity of building financial resilience and strength as a result of their participation in the FIRE program.

1.0 Background

Spring created the Financial Innovation and Resilience (FIRE) program to help NGOs build the financial strength and capabilities they need to sustain their important work around the world. FIRE is designed to do this through an innovative framework that strengthens organizations in five mutually reinforcing areas (Appendix A):

1. Funding and Financing Landscape
2. Resource Mobilization
3. Strategic Finance
4. External Communications
5. Leadership Practice

Through FIRE, however, organizations do not merely acquire innovative tools and techniques to improve the likelihood of mobilizing the resources they need. FIRE also fosters significant change in how NGOs view, organize and approach finance and resource mobilization, integrating and aligning these with their missions and their agency in the world.

FIRE aims to enable organizations to bring the vision, tenacity and resilience of their missions and programs to the mobilization of financial and other resources. Organizations learn the importance of harmonizing programs and resource mobilization and seeing resource mobilization as integral to the realization of an organization's mission and impact. When resource mobilization becomes a cross-organizational responsibility, greater internal cohesion and strength become possible, and the likelihood of positive outcomes is increased.

FIRE is premised on the need for change to take root in each of four inter-connected and mutually reinforcing change domains (Appendix B):

- **Individual / Interior:** staff are aware of beliefs that undermine effective engagement on resource mobilization; are confident regarding prospects for success; have affirmed their sense of purpose; and more.
- **Collective / Interior:** the organization nurtures teamwork; grasps the value of sharing responsibility for effective resource mobilization; coheres around clarity of purpose reflected in external communications and relationships with funders; and more.
- **Individual / Exterior:** staff use a range of tools and techniques; apply their creativity; monitor key indicators; try new things; enhance their technical skills; and more.
- **Collective / Exterior:** the organization analyses and responds to changes in the funding context; implements effective policies and practices; maintains and updates systems and strategies for greater coherence; and more.¹

The transformative changes FIRE catalyzes inside NGOs should enable organizations to help transform the ecosystem beyond in which they operate, by fostering relationships that better serve the realization of goals that both NGOs and donors want to achieve in the world.

¹ Based on: Spring's "Ahas in Quadrants" graphic; Roper, "Spring Forward," p. 18; and Spring, "FIRE PROGRESS and PROCESS Markers."

Since 2012, Spring has conducted FIRE trainings with over 350 organizations around the world. This report examines the program through the experience of four Ford Foundation BUILD grantee cohorts in Brazil, Indonesia, the Middle East and North Africa (MENA) and Southern Africa. The review of the program's effectiveness so far is intended to inform the FIRE team's internal learning as Spring prepares to embark on the next phase of FIRE.

The assessment framework

The assessment uses a mixed method approach that draws on:

- FIRE Diagnostic financial health indicators
- Surveys conducted at the conclusion of the programs
- Observation of the Southern Africa FIRE 1.0 Intensive at the start of the program, and the four cohorts' CampFIRE sessions at the conclusion,² and
- Desk review of FIRE materials (Appendix C).

FIRE program claims served as the starting point of the assessment. The assessment probes how the program is designed to work and what it is intended to enable organizations to achieve (Appendix D). The claims were distilled into survey questions to capture progress of three kinds:

1. **Attitude:** How well-prepared do participants feel by the FIRE training to achieve their goals? How do they feel about the responsibility and prospects for greater financial resilience and sustainability? Has that changed in some way as a result of FIRE?
2. **Practice:** What, if anything, are participants doing differently as a result of FIRE? Have they begun to use FIRE tools and apply FIRE guidance?
3. **Outcomes:** What, if anything, have they achieved so far with the use of FIRE tools and guidance?

The report reviews the findings on each of these dimensions and concludes with a discussion of learnings and recommendations.³

² I attended the FIRE 2.0 training for the Southern Africa cohort held on November 4-6, 2020, and the following CampFIRE sessions: Brazil, February 20, 2021; Indonesia, February 24, 2021; MENA, March 22, 2021; and Southern Africa, May 25, 2021.

³ I gratefully acknowledge Lucía Carrasco Scherer's tremendous assistance at every step in the production of this report – from administering the survey questionnaire, to generating graphs of survey results, to reviewing a draft of the report.

2.0 The FIRE Journey

The examination that follows is organized around three points in participants' FIRE Journey: prior to starting the FIRE program; during and through to the completion of the FIRE training; and their plans for the next phase in their journeys.

2.1 Embarking on the Journey

Between December 2019 and May 2021, the following BUILD cohorts undertook their FIRE training: Brazil (14 organizations); Indonesia, (13 organizations); MENA, (8 organizations); and Southern Africa, (11 organizations). Additionally, there were a total of six networks participating across the cohorts.⁴

Participating organizations and groups are quite diverse and began the FIRE program from different starting points:

- Years in operation (6-60 years),
- Staff size (1-76+),
- Income in 2019 (\$242K-\$11M)⁵ (Appendix E).

Three indicators offer a glimpse of where participants stood as they embarked on the FIRE program. One indicator is drawn from survey data, and two others from the FIRE Diagnostic, an innovative tool that captures organizational and financial baselines, which Spring develops for each individual organization early in the program, based on Financial Statements among other inputs (Appendix F).

As Table 1 shows, survey respondents shared that few had “good” policies, plans and practices in place when they began the FIRE program. As they embarked on the FIRE journey, the majority of participants had some way to go to develop and introduce the policies, plans and practices they would need for effective financial resilience and resource mobilization.

Table 1. Policies, plans and practices prior to FIRE

Policies, plans and practices	Already good	
Ethical prospecting standards	14	34%
Contractual compliance practices	12	29%
Financial policies	9	22%
Operating Reserves policy	8	20%
Organizational level strategic budget	7	17%
Strategic plan	7	17%
Communications plan	6	15%
Resource mobilization plan	6	12%
Board resource mobilization roles and responsibilities	5	12%
Staff resource mobilization roles and responsibilities	5	12%

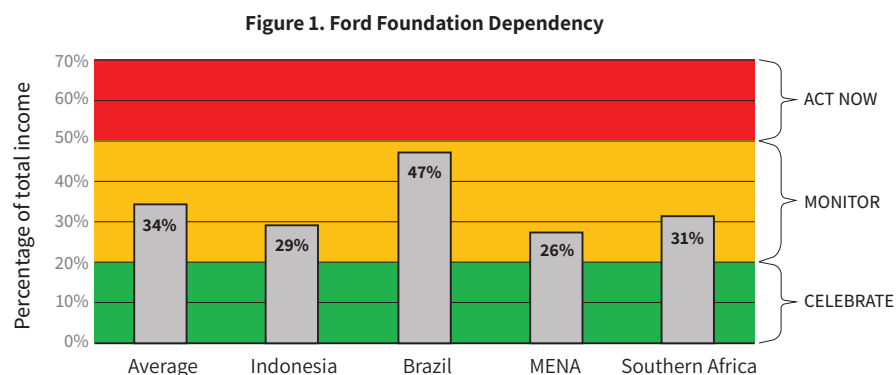
⁴ A total of six networks were part of these FIRE cohorts: four in Indonesia, one in Southern Africa and one in Brazil.

⁵ Prior to the FIRE Intensive organizations are invited to fill out a survey with key organizational data. Among others, total income for the last three fiscal years is requested. Given that some of the organizations had just become part of the BUILD program the same year they embarked on their FIRE journeys, their previous annual budgets did not reflect the BUILD grant (US\$1 million dollars per year over five years).

A second indicator is donor dependency, one of the FIRE Diagnostic's six components and focuses specifically on the dependency of Ford Foundation funding. FIRE cautions that "over-dependence on foreign [or any single source of] funding represents a real risk in terms of an organization or network's ability to continue its work,"⁷ and therefore recommends that dependence on any single donor should not exceed 20%.

Figure 1 displays the rates of dependency for the four cohorts when they began the FIRE program. Dependence on Ford Foundation varied considerably with a low of 26% and a very high 47% for Indonesia,⁸ with an average across the cohorts of 34%.

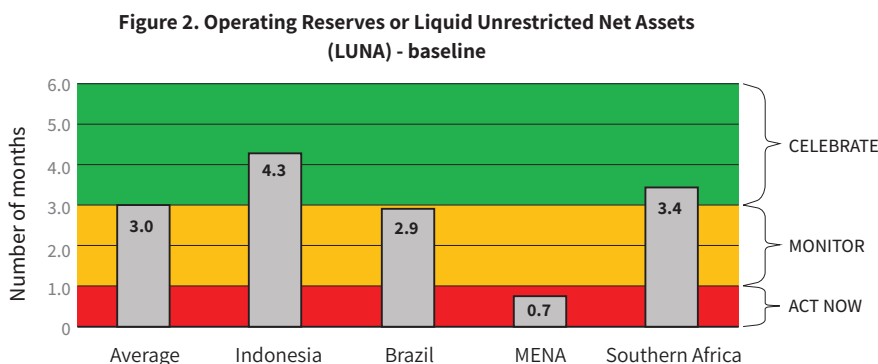
A third indicator of cohort status before FIRE is found in the number of months of reserve funds available to the participating organizations. FIRE considers such funds essential "as a cushion against unexpected events, losses of incomes, and large unbudgeted expenses" and to "provide security and stability." FIRE recommends three to six months of operating reserves.⁹



All data is based on Financial Dashboards created per organization and is from [audited] financial statements for fiscal years 2018 and 2019. Total organizations included in the sample: 39.

As Figure 2 reveals, considerable differences characterized organizations both across and within the cohorts: the range varied from a very low average of less than one month for MENA participants to a high of 4.3 months for Brazil.¹⁰ The average for the participating groups is three months of reserve funds on hand.

The preceding review of three areas of financial strength is the starting point for understanding the FIRE participants' need for support and guidance to establish firmer financial foundations for their long-term health and resilience.



All data is based on Financial Dashboards created per organization and is from [audited] financial statements for fiscal years 2018 and 2019. Total organizations included in the sample: 43.

⁷ Spring, "Primer 1: Funding and Financing Landscapes," p. 10.

⁸ There is also considerable variation within each cohort. Donor dependency for Indonesia organizations ranges from 12% to 90%, while the range for MENA is 2% to 55%. (Natilson and Moura, "Diagnostic trends", Spring 2021.)

⁹ Spring, "Primer 3: Strategic Finance," p. 11.

¹⁰ There are wide differences within each cohort: Brazil LUNA range from 0.1 month to 23.6 months; and for Southern Africa from 0 to 8.3 months. (Natilson and Moura, "Diagnostic trends", Spring 2021.)

2.2 The Journey Begins

The FIRE Journey begins with an intensive three-day training on the program's five components, which are further explored and developed over the course of eight to 12 months.¹¹ (See Appendix G for program details for each cohort.) The training portion of the FIRE Journey ends with a CampFIRE session that brings all cohort participants together for a final meeting, followed by an invitation to complete the close-out survey. The CampFIRE sessions and survey results together allowed us to assess the extent to which participants are using what they learned from FIRE, and what they are achieving.

Our review begins with an overview of findings for the four cohorts together and then turns to examine each cohort separately. Each section discusses what participants explicitly attribute to their participation in the FIRE program in terms of:

- Attitude: What they feel, their mindset and confidence regarding prospects for success
- Practice: What they are doing, trying, using of the new practices and approaches
- Outcomes: What they are achieving, and the results they have to show so far

2.2.1 All Cohorts

Across the four cohorts, survey respondents expressed overwhelming satisfaction with the FIRE program. All survey respondents (100%) indicated that the program had either met or exceeded their expectations, and that they would recommend the program to others. Although participants' satisfaction with the program is important, this assessment focuses instead on determining whether FIRE program participants are experiencing the change the program is intended to catalyze or enable.

Attitude

A key premise of the FIRE program is the need to bring awareness to internal attitudes that impede effective finance and resource mobilization. What participants bring individually to their organization's outreach and resource mobilization can affect outcomes. Stated simply, if participants do not leave the FIRE program optimistic and confident about their prospects for success, success is unlikely.

As such, FIRE begins with “unlearning,” with a particular emphasis on attitudes and beliefs that undermine individuals' efforts to meet their resource mobilization aspirations. At the heart of this is a participant's personal relationship to money and how it may inform their approach to finance and fundraising for their organization. FIRE brings awareness to this, and this is reflected in the survey results: between 86% of the MENA and 100% of the Southern Africa cohort participants indicated they are now somewhat or very much aware of how their personal relationship to money influences their approach to their organization's finance and fundraising.¹²

¹¹ The Brazil FIRE training, for example, was launched in March 2020 and completed in February 2021. Over the course of 11 months, an average of 42 team members from 14 organizations participated in: two workshops; five virtual sessions held every three weeks; five individual sessions; and two extra sessions including one on communication. Together, the training involved an average of 33 hours per organization as follows: 13 hours, workshops; 7.5 hours, virtual sessions; 7.5 hours, support sessions; and 5 hours, individual sessions. (Spring, PPT: Campfire - Preparation Meeting, January 27, 2021)

¹² Survey respondents who are very much aware: Brazil, 62%; Indonesia, 67%; MENA, 43%; and Southern Africa, 67%.

Although the small size of the sample requires caution, respondents' awareness may indeed have a positive effect with implications for success: the survey shows that 19 of the 25 (76%) of the respondents who indicated that FIRE had made them very much aware of the impact of their personal relationship to money on their organization's finance and fundraising, also indicated that FIRE had enabled their organization to communicate more confidently with donors. The result may suggest a relationship that is worth further exploration.

During the program, participants "unlearned" a number of consequential limiting beliefs that include: "overhead is something bad," "the financial area is impossible to break into," and "organizational roles (are) fixed." Such FIRE-catalyzed "unlearning", combined with FIRE learning, may well explain the confidence that respondents expressed regarding their prospects on a number of fronts related to resource mobilization as summarized in Table 2.

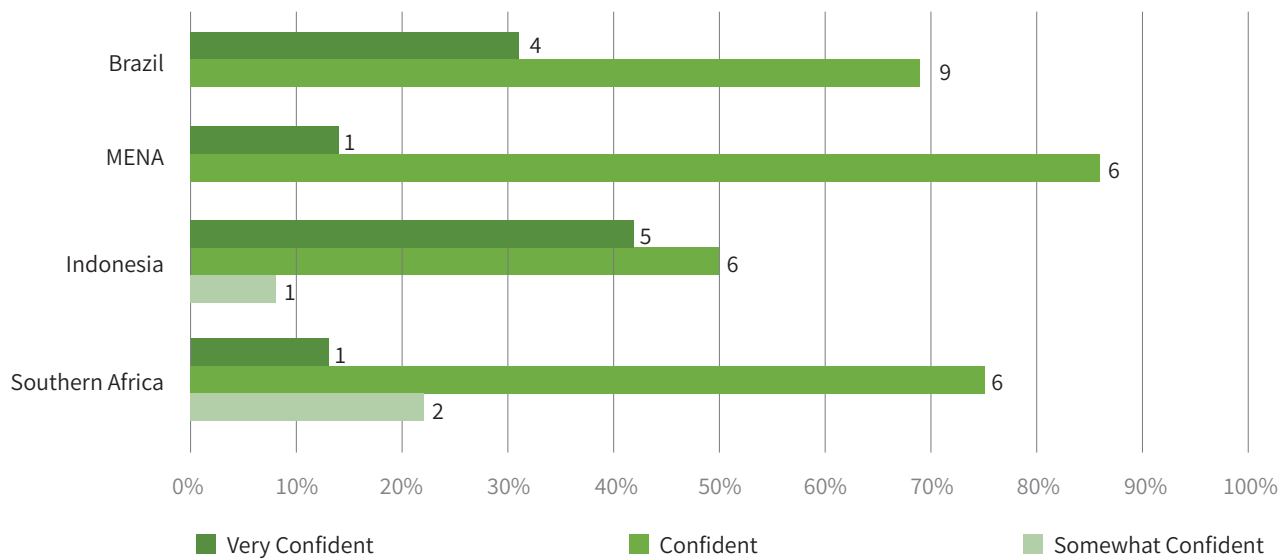
Table 2. Confidence in financial prospects and impact

Prospects for:	Brazil	Indonesia	MENA	Southern Africa	All Cohorts
Financial resilience and health (weighted average on 10 point scale)	8.3	7.9	7.6	7.4	7.9
Building and maintaining financial health (weighted average on 10 point scale)	8	7.9	7.8	7.6	7.9
Greater impact in the future	13 (100%)	12 (100%)	5 (83%)	8 (100%)	38 (93%)
Reduced dependence on Ford Foundation in next 2-3 years	7 (54%)	11 (92%)	4 (57%)	5 (56%)	27 (66%)

Survey participants expressed a high level of confidence in how well their organizations will do, with an average of 7.9 on a 10-point scale for both (1) realizing greater financial resilience and health and (2) building and maintaining financial health. Differences in degrees of confidence across the four cohorts are captured in Figures 3 and 4.

Figure 3. Confidence about financial resilience as a result of FIRE program

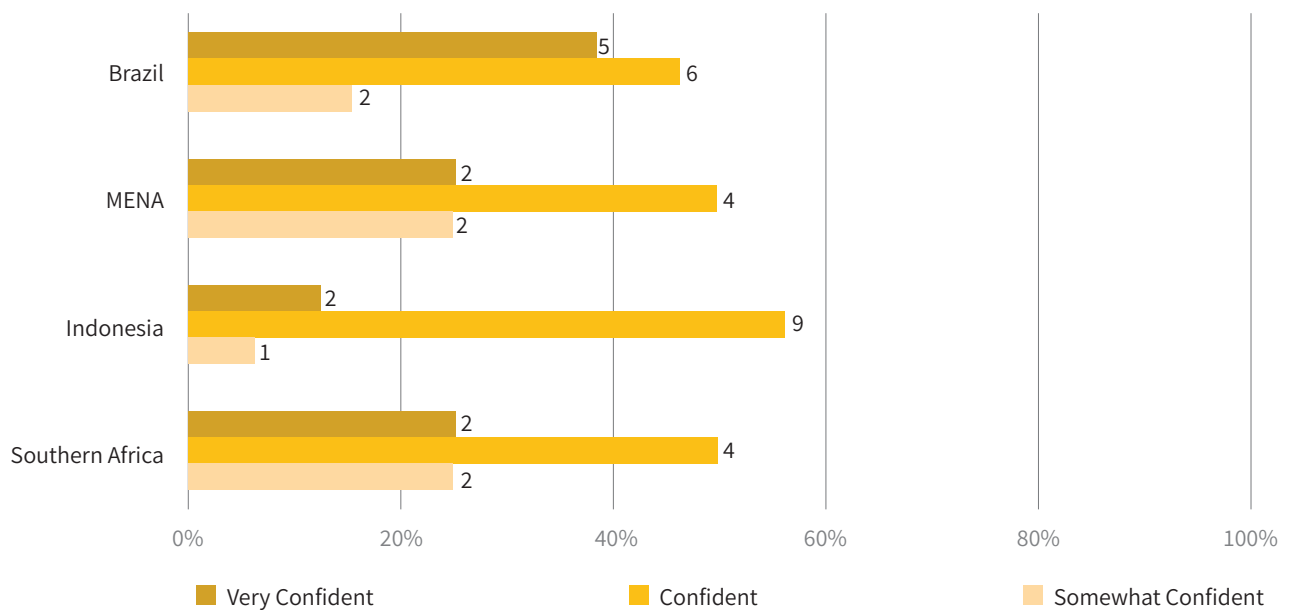
N=41



On 10-point scale; 9-10, very confident; 7-8, confident; 5-6, somewhat confident; 3-4, not confident; 1-2, not at all confident.

Figure 4. Confidence in building and maintaining financial resilience

N=39



On 10-point scale; 9-10, very confident; 7-8, confident; 5-6, somewhat confident; 3-4, not confident; 1-2, not at all confident.

Further, with the exception of a single respondent, virtually every survey participant believes that their participation in the FIRE program will enable their organization to have greater impact in the future.

Another measure of participants' positive outlook regarding their prospects for success is noted in relation to dependence on Ford Foundation funding, also shown in Table 2. It is notable that the Indonesia cohort, which began the program with the highest (47%) dependency on the Foundation, expressed the greatest confidence (11, 92%) that their dependence on Ford would be reduced in the next two to three years as a result of their participation in FIRE. Even though the other cohorts' dependence on Ford is considerably less, over half also project a decrease in their reliance on Ford in the coming years, owing to FIRE.

Viewed together, the findings reveal participants' positive and optimistic attitudes regarding their ability to realize their organizations' resource needs as a result of what they have acquired from participation in the FIRE program: this bodes well for their effective engagement on resource mobilization.

Practice

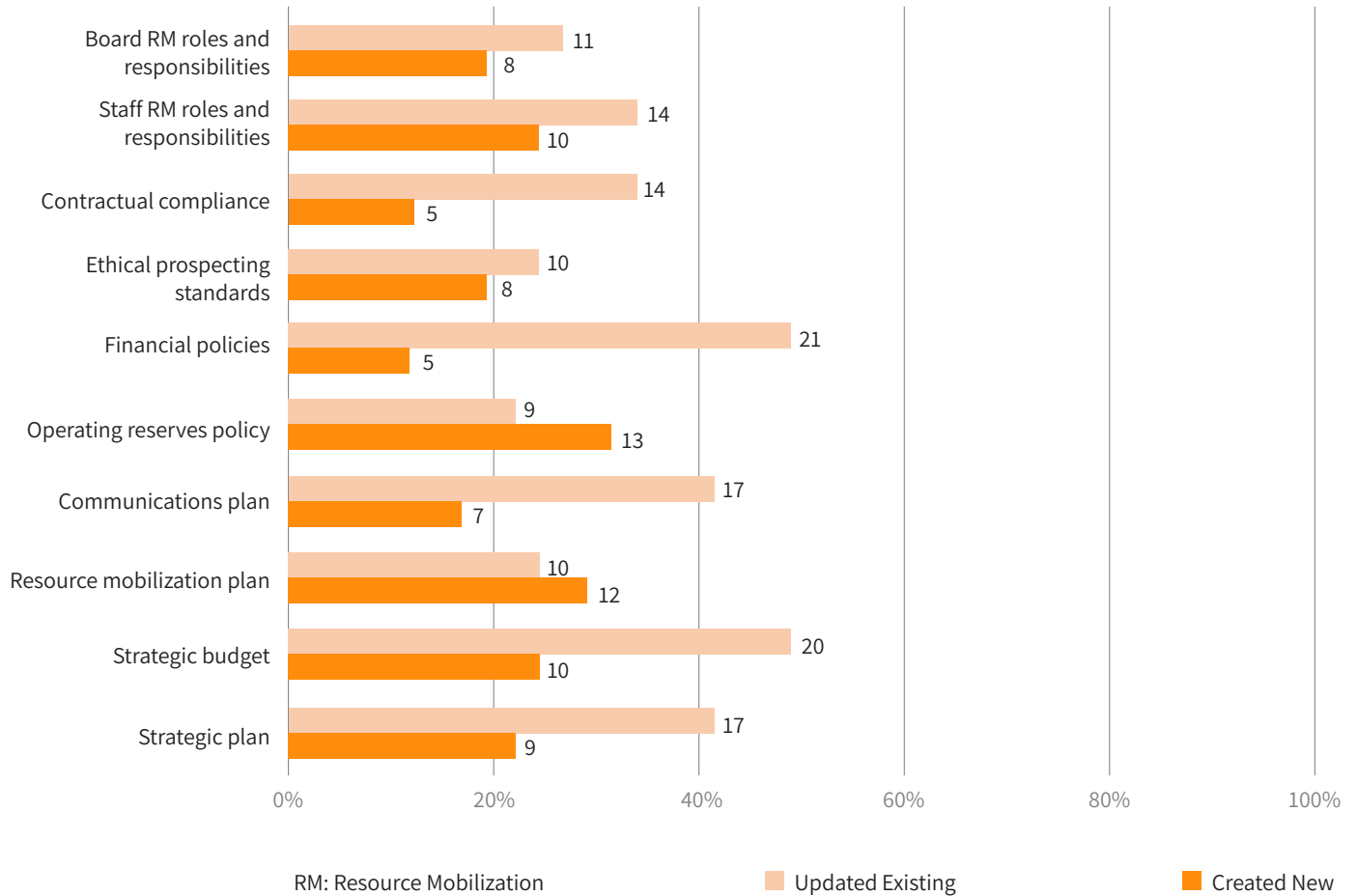
The explanation for respondents' evident confidence regarding the outlook for the future, which they attribute to FIRE, appears to lie in what respondents have done with FIRE learning over the course of the program, even while still immersed in the training.

Policies, plans and practices

As Figure 5 reveals, a significant proportion of respondents have either updated or created policies, plans or practices since FIRE, with over half, and in some cases significantly more, now operating with these in place. There is, of course, variation across the cohorts, which is discussed below. However, overall, it is clear that participants have taken FIRE guidance seriously, have begun to implement learnings and made serious strides, even while in the midst of the program. Figure 6 visually captures the difference that FIRE has made in the cohorts' preparedness.

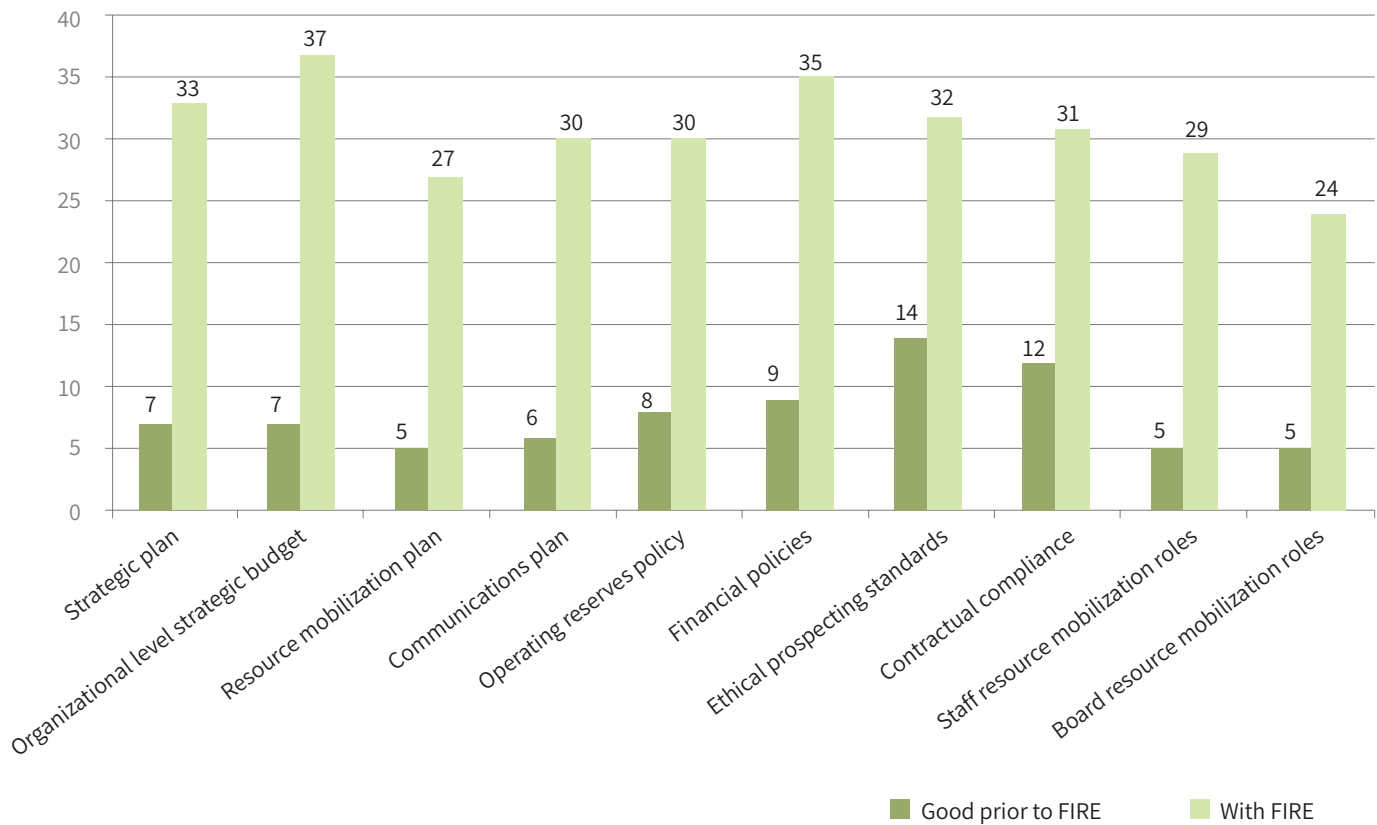
Figure 5. Policies, plans and practices updated and created since FIRE

N=41



Tools and strategies

Figure 6. All Cohorts: Policies, plans and practices



Participants are using and trying the six tools and strategies they learned from FIRE: these are scenario budgeting, financial health indicators, income diversification, budget lines for resource mobilization and communication, building capital reserves and a strategic budget. As Table 3 reveals, over one-third (34%) are using all six tools often or regularly, and three-fourths are using at least four often or regularly.

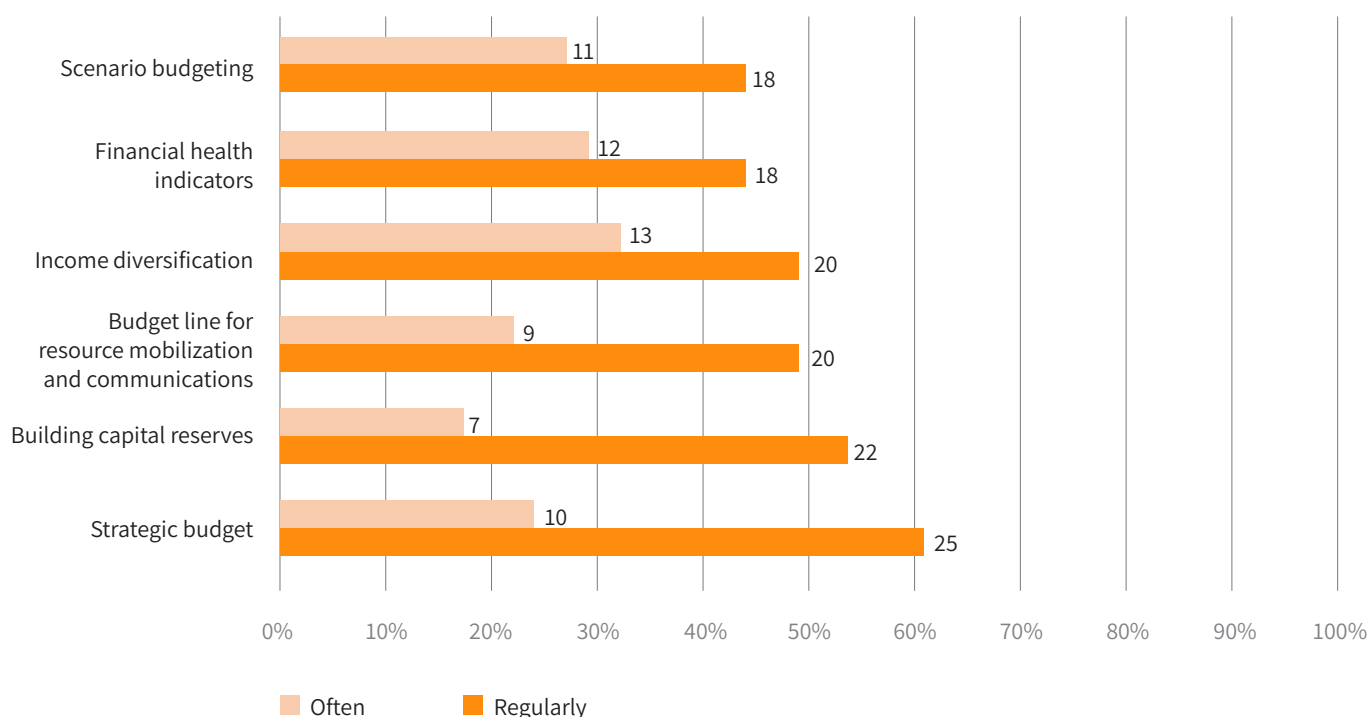
As Figure 7 shows, strategic budgets are the financial tool most in use since FIRE, which 35 (85%) respondents use often or regularly. However, even the tools least used – scenario budgeting, budget lines for resource mobilization and communications, and

building capital reserves – are often or regularly used by 71% of the 41 respondents. This suggests that respondents have found the tools covered in the FIRE program to be genuinely useful. Since FIRE, 30 (73%) respondents report often or regularly using financial health indicators, or the

Table 3. Number of FIRE tools and approaches used often or regularly

Tools and approaches	All cohorts (survey respondents)	
1	1	2%
2	5	12%
3	4	10%
4	7	17%
5	10	24%
6	14	34%
Total	41	100%

Figure 7. Use of tools
N=41



Diagnostic.¹³ This is a key FIRE tool that 23 (59%) respondents have fully reviewed and used in their internal communication or have begun to update. None, however, had used it to communicate externally, suggesting that they either were not clear on how to use it in their outreach to donors, or had difficulty doing so.

Capital reserves are a topic on which FIRE places particular emphasis. Reserve funds present

challenges for non-profits and overcoming them is difficult: a frequently held view is that donors do not support them, or they are a luxury they cannot afford. As shown in Table 4, 31 (82%) respondents described some action in relation to a capital reserves fund since FIRE. The action varies from planning to develop a reserve, to drafting reserve policies, to growing the reserves, to establishing change and innovation reserves.

Only seven (18%) reported no movement on their organization's capital reserves. Given the difficulties involved, this suggests that most respondents are overcoming self-defeating attitudes that hold organizations back from requesting or creating these funds.

FIRE participants have also begun to try new revenue generating streams. Table 5 reflects the activity of

Table 4. Capital reserves since FIRE

Actions	All cohorts	
Increasing the reserves	8	21%
Creating reserve policies	7	18%
Allocating funds for reserves	5	13%
Updating reserve policies	3	8%
Using the reserves to make investments and generate income	3	8%
Planning for developing reserves	3	8%
Creating a reserve fund for change or innovation	2	5%
Rebuilding capital reserves	1	3%
No developments	7	18%
Total	39	100%

¹³ There may some confusion around this. The survey item was "Financial health indicators ('the diagnostic')." Although the question was intended to capture use of the Diagnostic, it is not clear that respondents understood that.

respondents: between 5% (impact investing) and 29% (joint proposals) have tried new strategies to diversify their sources of funding since FIRE.

Although few in number, it is notable that some respondents pursued these avenues while the

Table 5. Revenue generating strategies tried since FIRE

Revenue generating strategies	Tried since FIRE		Successful*	
Joint proposal with other organizations	12	29%	9	75%
Individual donors, small gifts	11	27%	9	82%
Online fundraising	8	20%	6	75%
Income-generating service or activity	6	15%	5	83%
Corporate contributions	6	15%	5	83%
Membership dues	4	10%	3	75%
Individual donors, large gifts	3	7%	1	33%
Impact investing	2	5%	2	100%

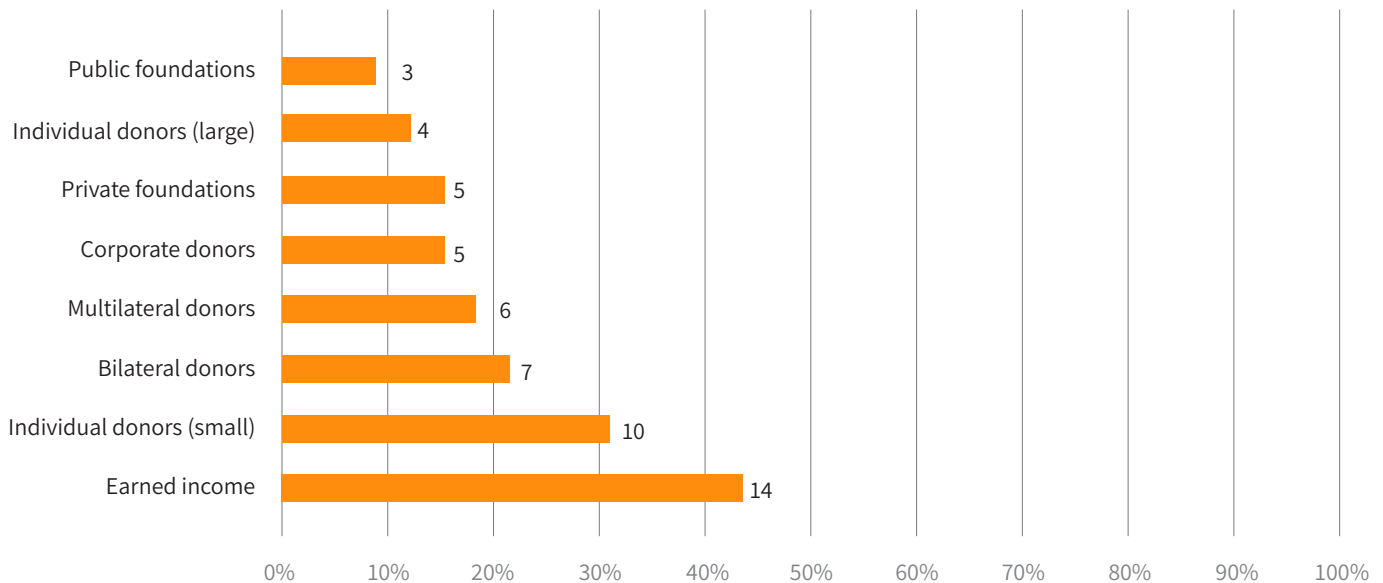
*As a percent of those who tried the same strategy

program had not yet been concluded. Moreover, there is a high rate of success reported by those who have tried new revenue generating strategies since FIRE. As Figure 8 suggests, and discussed further below, participants have also begun to approach a variety of new funding sectors.

Donor relations

Figure 8. Funding sectors approached for the first time since FIRE

N=41



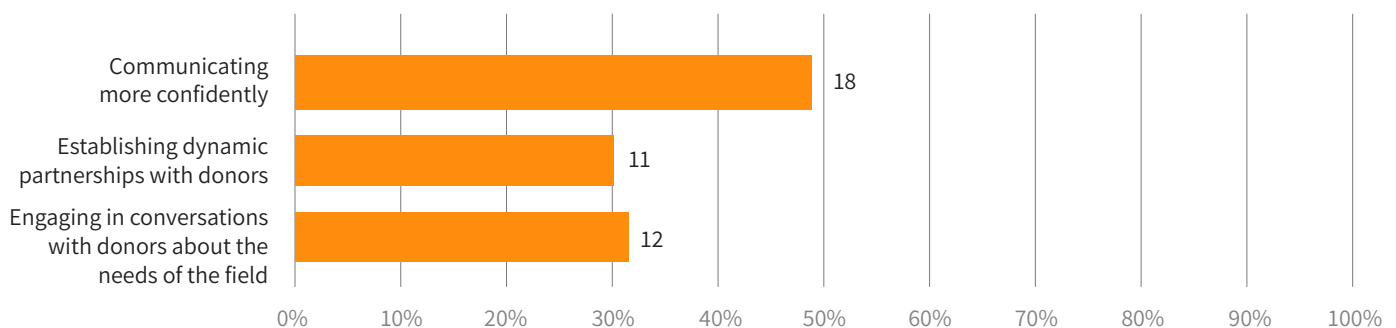
FIRE addresses relations with donors with a number of aims. A healthy and open relationship with a donor can help secure the resources an organization needs, and in the long term, can inform the transformation of the funding ecosystem.

Donor relations are critical, and as Figure 9 indicates, FIRE has helped, with 49% (18) of the participants crediting FIRE with enabling them to communicate more confidently with donors. Moreover, 30% (11) of participants also feel they have been better able to establish more dynamic partnerships with donors, and 32% (12) discuss the needs of the field beyond their own needs. These findings are consistent with Spring's aspirations to enable NGOs to actively contribute to shaping their fields and the donor landscape in which they operate.

Table 6 shows that even while in the midst of FIRE, respondents are more comfortable in their readiness

Figure 9. Approaches to donors enabled very well by FIRE

N=37



or ability to request what they need from donors as a result of the program.

Prior to the program, over half of the respondents already communicated to donors their need for core support, multi-year grants, and/or fewer restrictions on grants, and as a result of FIRE, now over three-fourths (79%) do so. FIRE has also more than doubled the number of respondents who have raised or negotiated with donors on capital reserves (from 26% to 67%) and cost recovery (from 26% to 56%).

As Figure 10 shows, the one issue that respondents appear less able or more reluctant to bring to

Table 6. Raised or negotiated with new or existing donors

Grants related issues	Prior to FIRE		Since FIRE		Prior & Since FIRE*		Prior and Since FIRE** (all Prior and Since respondents)	
Core support	20	56%	11	31%	31	87%	31	79%
Starvation cycle	4	11%	5	14%	9	28%	9	23%
True cost recovery	9	26%	13	38%	22	65%	22	56%
Capital reserves	10	26%	16	42%	26	68%	26	67%
Multi-year grants	21	55%	11	29%	32	84%	32	82%
Grants with fewer restrictions	18	51%	12	34%	30	86%	30	77%

*Percent excludes “Don’t Know”

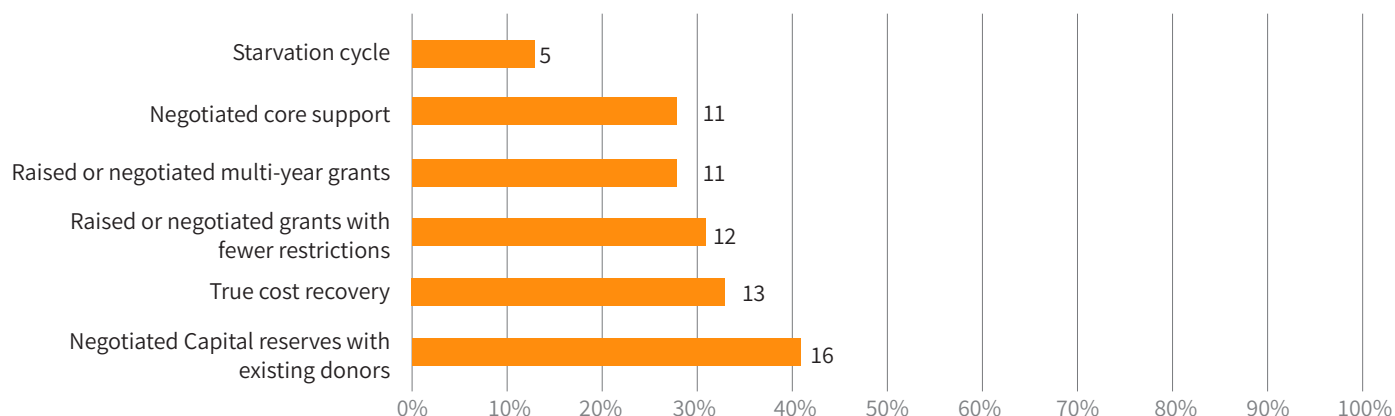
**Percent includes “Don’t Know”

donors is the starvation cycle, with still fewer than a quarter of respondents indicating they have done so.

The FIRE program has informed the relationship between participants and their donors. One

Figure 10. Issues raised or negotiated with donors

N=41



indication of the relationship is noted from the fact that 20 (71%) of the 28 respondents who are very optimistic about the prospects for greater financial resilience and health, due to FIRE, also feel that FIRE has enabled them to communicate more confidently with donors. An examination of respondents' use of FIRE tools may explain what may be responsible for the increased confidence and comfort with donors.

Among the 28 respondents who are optimistic about their organization's prospects for greater financial resilience and health, owing to FIRE, many indicated using the following tools often or regularly:

- Financial health indicators (24, 86%)
- Income diversification (24, 86%)
- Strategic budgeting (23, 82%)
- Building capital reserves (22, 79%)
- Budget line for resource mobilization and communications (21, 75%)
- Scenario budgeting (21, 75%)

This suggests that their actual use of and experience with FIRE tools and strategies may have something to do with their confidence about the future. Again, the small size of the sample requires caution in interpreting the findings, but the findings do suggest the relationship may be worth further exploration.

Outcomes

FIRE participants are already reporting results. The high rates of success have already been noted for respondents who attempted new revenue generating strategies since FIRE. Among the respondents who tried a new strategy, a minimum of three-fourths reported success for every strategy tried. The one exception is large gifts from individual donors, which had both the fewest number who tried it (3, 7%) and which yielded the lowest success rate (1, 33%).¹⁴

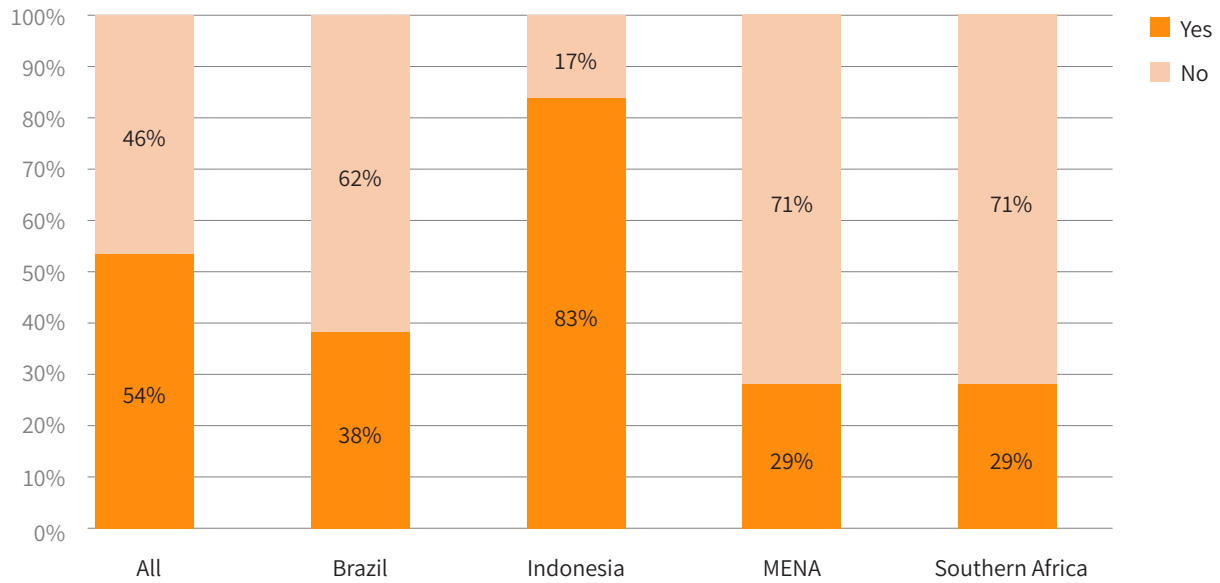
As Figure 11 captures, over half of the survey respondents indicated they have already raised funds due to FIRE. However, the exceptionally high success reported by Indonesia respondents is responsible for elevating the overall average. Without minimizing that success, the Indonesia cohort began the FIRE journey earlier than the others and thus had more time to implement learnings.¹⁵ Nevertheless, participants had begun to try out what they learned even before completing the entire FIRE program, and with success.

There are numerous factors involved to explain the success respondents reported in raising funds. One

¹⁴ Spring may benefit from contextualizing large giving by individual donors, as the factors involved likely vary considerably across the world¹⁵ The four cohorts began their FIRE journeys at different times: Indonesia, October 2019; Brazil, December 2019; MENA, June 2020; and Southern Africa, August 2020. Therefore, the amount of time they had to explore and implement FIRE tools and guidance, which the close-out survey was designed to capture, also varied: Indonesia, 16 months; Brazil, 14 months; MENA, nine months; and Southern Africa, nine months. (See Appendix G)

Figure 11. Percent of cohorts that raised more funds as a result of FIRE

N=41



factor appears to be use of FIRE tools and strategies. Among the 22 (54%) respondents who had raised more funds as a result of FIRE are those who had created or updated the following since FIRE:

- Strategic budget (18, 82%)
- Resource mobilization plan (17, 77%)
- Strategic plan (16, 73%)
- Communication plan (16, 73%)

Similarly, the 22 organizations that have raised more funds, as a result of their participation in FIRE, had also created or updated the following:

- Staff resource mobilization roles and responsibilities (18, 82%)
- Financial policies (17, 77%)
- Board resource mobilization roles and responsibilities (15, 68%)
- Reserve policies (15, 68%)

Finally, the experience of the four cohorts suggests that the longer that participants are on the FIRE journey, the more they are trying out what they acquired from the program and showing results.

2.2.2 Brazil

“The FIRE program allowed the institution to realize the advantages of addressing finance in a more strategic manner, in line with the programs and a view of change.” (CampFIRE participant)

Fourteen Brazil organizations participated in the FIRE training (December 2019 - February 2021), of which 13 (93%) completed the survey and 14 (100%) attended the CampFIRE session:

- These are well-established organizations that range in age from nine to 60 years, with half having worked for 21 years or longer.
- Likewise, they vary in size from 11 staff and volunteers to as many as 76 or more.
- Their 2019 income ranged from \$605K to \$11M, with a median of \$1.2M. However, the \$11M income is a distinct outlier, with \$3.3M as the next highest income that year (Appendix E).

Attitude

Brazil respondents emerged from the FIRE program the most confident of all cohorts regarding the future. As a cohort, they rated their prospects for financial resilience and health an 8.3 on the 10-point scale, and 8.0 for building and maintaining financial health. Another area in which they expressed optimism is in relation to dependence on Ford funding. Although Brazil participants had a relatively low average donor dependence (29%) at the start of the FIRE program, seven of the 13 (54%) survey respondents believe their dependence on the Foundation will be reduced in the coming two to three years, owing to their participation in FIRE.

Brazil CampFIRE participants appeared quite self-assured regarding their new-found finance and resource mobilization capacity. Their confidence appeared to be particularly anchored in the realization that “financial health is something that has to be...known by the entire organization, and not just that small section that is finance.” This refrain was heard equally during other cohorts’ CampFIRE sessions. One Brazil participant described the resulting change as no longer “looking at the organization according to themes or specific areas but looking at the organization as a whole in your planning process.” Arguably, this discovery is key to participants’ understanding of how FIRE serves the organization.

Practice

Policies, plans and practices

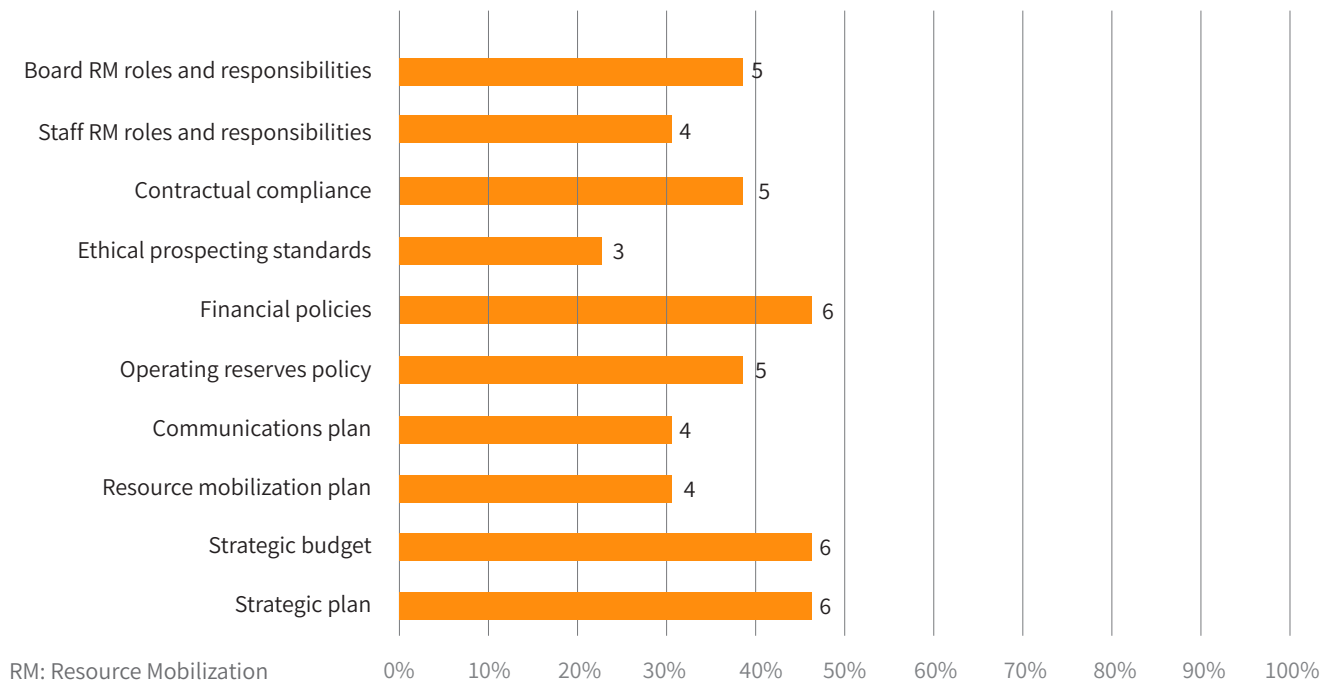
Fewer than one-third of Brazil survey respondents entered the FIRE program with good forms of eight of 10 policies, plans and practices needed for financial health and resilience.¹⁶

As Figure 12 reveals, since FIRE, Brazil participants have actively created or updated their organizational level strategic budget (6, 46%) and strategic plan (6, 46%) and five (38%) their staff resource mobilization roles and responsibilities, operating reserves policy, and financial policies. However, more than half (8, 62%) of the Brazil respondents have yet to tackle board resource mobilization roles and responsibilities.

¹⁶ Seven (54%) Brazil respondents entered the FIRE program with a good policy in place for ethical standards to prospecting, and five (38%) had good contractual compliance practices.

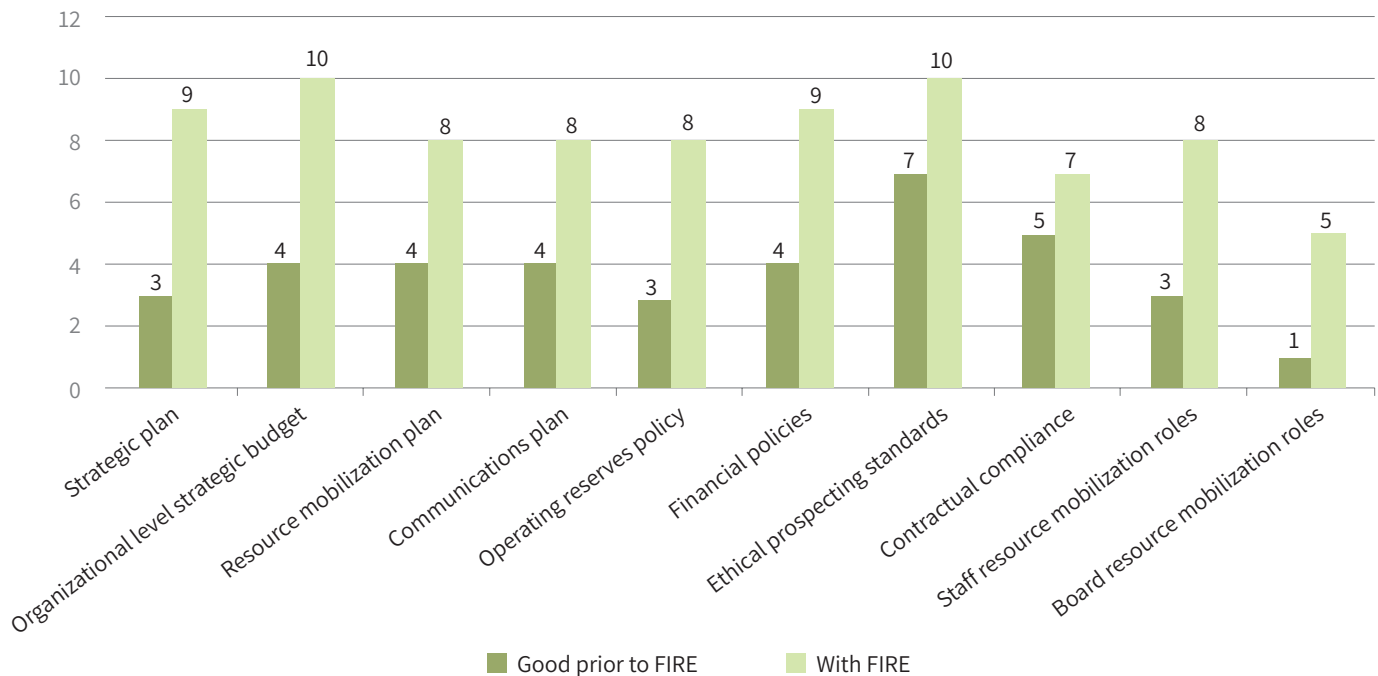
Figure 12. Brazil: Policies, plans and practices updated and created since FIRE

N=13



With the addition of the policies, plans and practices which have been updated or created since FIRE, between 54% and 77% of Brazil respondents now have nine of the 10 items that FIRE emphasizes,

Figure 13. Brazil: Policies, plans and practices



captured graphically in Figure 13.

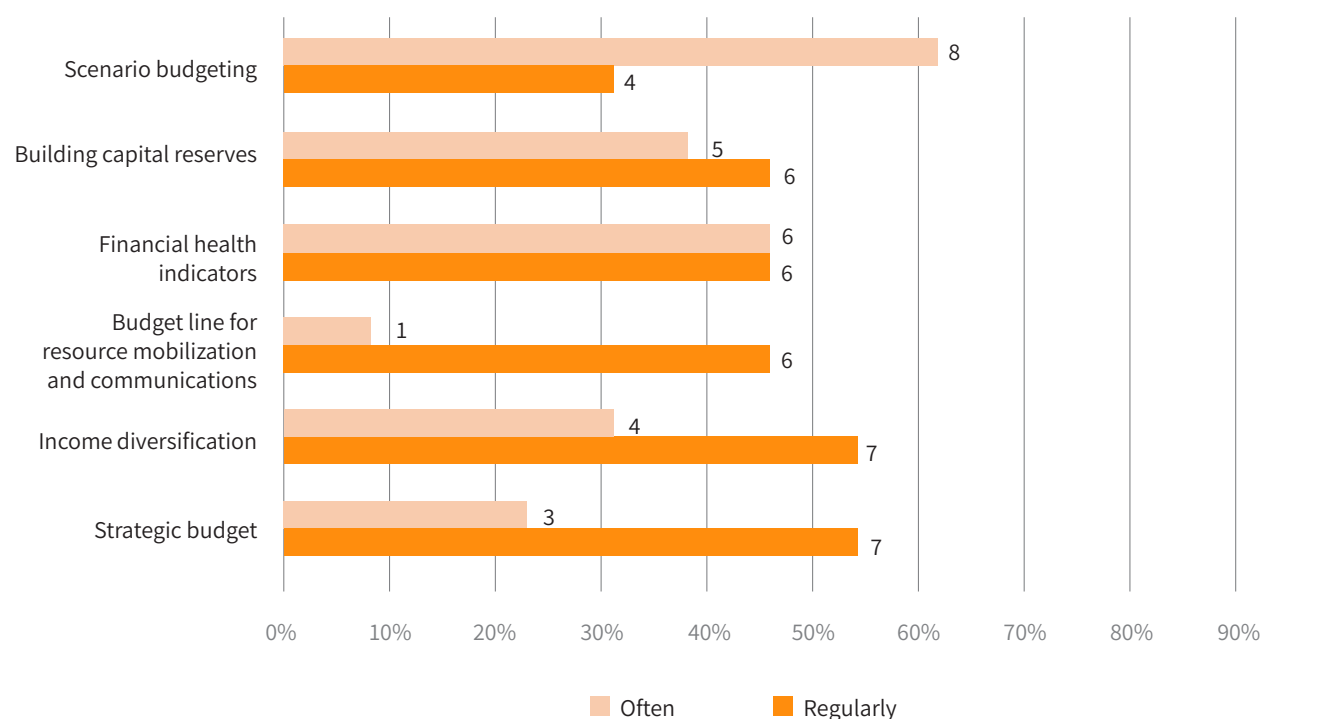
Tools and strategies

As Figure 14 shows, more than half of Brazil respondents report often or regularly using the full range of tools and techniques since FIRE.

Moreover, over three-fourths are often or regularly using five of the six tools. Remarkably, 12 (92%) reported often or regularly using both scenario budgeting and financial health indicators. Even the budget line for resource mobilization and communications a tool used by the fewest respondents (7, 54%), is used by over half of respondents.

Figure 14. Brazil: Use of tools

N=13



As noted, 12 (92%) reported using financial health indicators often or regularly. This is the highest percentage among the cohorts, with the next highest being 75% of Indonesia respondents. However, it is not clear that this refers to the Diagnostic, as only eight (62%) have either partially or fully reviewed the Diagnostic, and the rest (5, 38%) have not yet reviewed it.

As can be seen from Table 7, only a single Brazil participant pursued three revenue generating strategies prior to FIRE that did not require improvement. Considerably more (23%-54%) reported having previously tried strategies that improved subsequent to their participation in FIRE. Interestingly, at least one respondent has tried all but one of the new strategies, as a result of FIRE. Four (31%) took on on-line fundraising, and three had successful results.

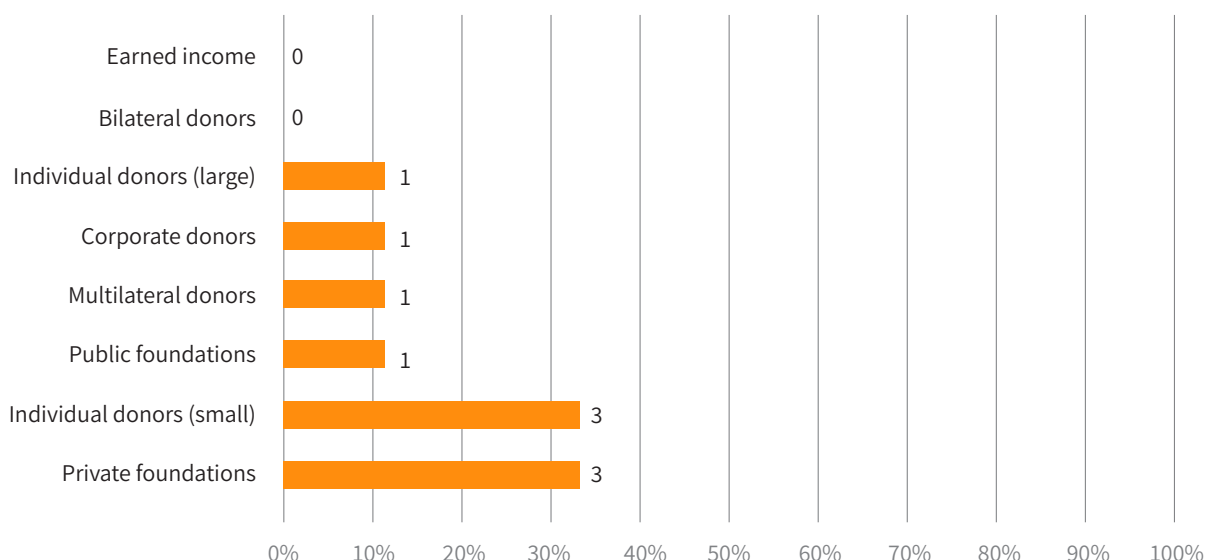
Table 7. Brazil: Revenue generating strategies tried since FIRE

Revenue generating strategies	Already doing and no need to improve		Already doing but improved with FIRE		Tried since FIRE		Successful*	
Joint proposal with other organizations	1	8%	7	54%	1	8%	1	100%
Income-generating service or activity	1	8%	5	38%	0	0%	0	--
Individual donors, small gifts	0	0%	4	31%	2	15%	0	0%
Individual donors, large gifts	1	8%	3	23%	1	8%	0	0%
Corporate contributions	0	0%	4	31%	1	8%	0	0%
Membership dues	0	0%	3	23%	1	8%	1	100%
Online fundraising	0	0%	3	23%	4	31%	3	75%
Impact investing	0	0%	4	31%	1	8%	1	100%

*As a percent of those who tried the new strategy

Survey participants were queried about eight funding sectors to see whether FIRE had played a role in their pursuit of sectors they had not approached before. As Figure 15 reveals, nine (69%) respondents approached a combined six of the eight sectors for the first time.

Figure 15. Brazil: Funding sectors approached for the first time since FIRE
N=12

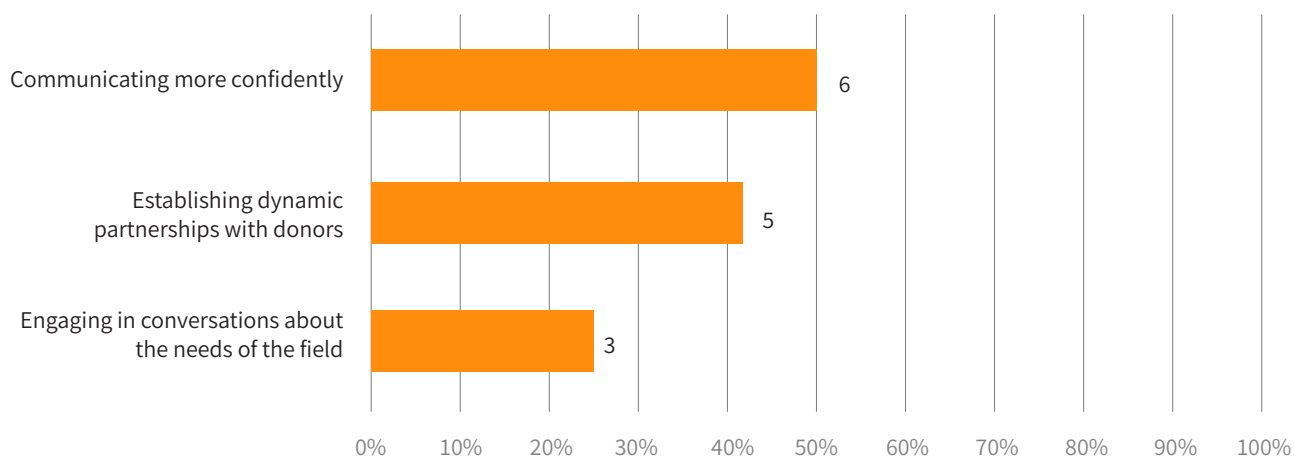


Donor relations

FIRE appears to have strengthened all Brazil participants' comfort, know-how and/or resolve in relationships with donors.

As Table 8 shows, five of 12 (42%) respondents reported already communicating confidently with donors, prior to FIRE. As a result of the program, now all 12 do so. As Figure 16 shows, among them are six (50%) who credit FIRE with their ability to communicate very well with donors. A Brazil CampFIRE participant described such an experience: "The negotiations with other grantmakers are beginning to include talks about overhead, results and other elements."

Figure 16. Brazil: Approach to donors enabled very well by FIRE
N=12



¹⁷ The figures for the other cohorts are: MENA, 33%; Southern Africa, 29%; and Indonesia, 8%.

Table 8. Brazil: Actions enabled by FIRE

Actions	Did well prior to FIRE		Doing somewhat or very well since FIRE		Not yet tried		Total	
Communicate more confidently with donors	5	42%	7	58%	0	0%	12	100%
Request the amounts that cover our true costs from donors	8	67%	3	25%	1	8%	12	100%
Engage in conversations with donors about the needs of the field, beyond our own organization	4	33%	6	50%	2	17%	12	100%
Establish dynamic partnerships with donors that go beyond the giving/receiving of grants	7	58%	4	33%	1	8%	12	100%

FIRE emphasizes degrees or gradations of engagement with donors. Remarkably, as Table 8 indicates, eight (67%) Brazil respondents reported already doing well requesting true costs from donors even prior to FIRE. This is by far higher than the other three cohorts.¹⁷ But even Brazil respondents experienced an improvement with 11 (92%) indicating they are now doing well in requesting coverage of true costs from donors.

As noted, Spring aspires to enable groups to influence donors' understanding of needs beyond those of their individual organizations. Prior to FIRE, one-third (4) of respondents engaged in conversations with donors about the needs of the field more broadly. Since FIRE, as Figure 16 shows, more Brazil respondents have established such partnerships with donors, and attribute their ability to do so very well to FIRE. This bodes well for greater NGO agency in shaping the ecosystem, and prospects for transformation in the long run.

Even before starting the FIRE program, nearly two-thirds (8) of respondents discussed core support, multi-year grants, and reduced restrictions on grants with their donors. As Table 9 reveals, since FIRE, over three-fourths (10, 77%) now do so. One issue that appears to be most challenging, or which participants are most reluctant to broach with their donors, is the starvation cycle, which nine (69%) indicated they have not done. As will be shown, other cohorts similarly did less well on this.

Table 9. Brazil: Raised or negotiated with donors

Grants related issues	Did prior to FIRE		Now, with FIRE	
Core support	8	62%	10	77%
Starvation cycle	2	15%	3	23%
True cost recovery	5	38%	6	46%
Capital reserves	6	46%	9	69%
Multi-year grants	8	62%	10	77%
Grants with fewer restrictions	8	62%	11	85%

Outcomes

Several Brazil respondents already attribute important results to FIRE. The success that many respondents have experienced diversifying their sources of income has been noted, and is shown in Table 10. These include three (23%) respondents who reported success with online fundraising, and one (8%) each with joint proposals, membership dues, and impact investing. Further, five respondents (38%) indicated that they have already raised more funds. However, other outcomes are equally notable, including the impact on organizations' operations, and greater cohesion.

Table 10. Brazil: Revenue generating strategies tried since FIRE

Revenue generating strategies	Tried since FIRE		Successful*	
Joint proposal with other organizations	1	8%	1	100%
Membership dues	1	8%	1	100%
Impact investing	1	8%	1	100%
Online fundraising	4	31%	3	75%
Individual donors, small gifts	2	15%	0	0%
Individual donors, large gifts	1	8%	0	0%
Corporate contributions	1	8%	0	0%
Income-generating service or activity	0	0%	0	--

*As a percent of those who tried the new strategy

Queried about the impact of going through the program as a team, respondents shared several insights. One participant described “becoming clearer about the importance of integrated work among the different areas of the organization” following recognition that “financial resilience has to be an overarching theme for the organization.” Another respondent captured it thus:

“The biggest impact was a changing view of the strategic role for financial and budget planning, at the level of projects as well as at the institutional level. The institutional culture has always been one of preparing the budget as a formal step, but without a more profound strategic view.” The outcome is succinctly described by yet another respondent as “we now have a new outlook on fundraising, which is a strength we developed after FIRE, and the team’s involvement with the financial issues.” The goal of the FIRE program is that participants recognize the power and potential of aligning financial and resource mobilization dimensions with their organization’s programs and mission. Indeed, respondents shared numerous examples of how this is manifested, including “The program offers tools to optimize planning and emphasize the institutional mission”; and “Program and financial dimensions are now more in sync.” Clearly, Brazil participants have grasped and value FIRE’s aim and intention.

2.2.3 Indonesia

"If the organization is healthy, the public service program will run smoothly." (CampFIRE participant)

Thirteen organizations participated in the FIRE training (October 2019- February 2021) of whom 12 (92%) completed the entire survey and nine (69%) attended the CampFIRE session:

- Like their counterparts in Brazil, the Indonesia groups have been in operation for some time: the youngest was established nine years ago and the oldest 41 years ago, and the median is 22 years in operation.
- The median number of staff lies in the category 11-25. However, the range includes a very small organization with 1-5 staff and volunteers, and a very large one with 76 or more.
- Their 2019 income ranges from \$242K to \$3.6M, with a median of \$600K, which is half that of the other three cohorts (Appendix E).

Attitude

Indonesia respondents began the FIRE program with fewer finance and resource mobilization tools in place and the least experience compared to the other cohorts. However, they have since tried or incorporated more tools, strategies, and approaches of any of the four cohorts. Of course, as the first to enter the program, Indonesia participants also had the most time (16 months) in which to use what they acquired. These respondents emerged from the FIRE program confident regarding their future prospects. On a 10-point scale, Indonesia respondents gave an average rating of 7.9 for their organizations' prospects for both financial resilience and health and building and maintaining financial health.

In a remarkable expression of optimism, every respondent but one (11, 92%) indicated they expect their dependence on the Ford Foundation will be reduced in the coming two to three years, owing to their participation in FIRE. This is noteworthy, both because it greatly exceeds that of the other cohorts, and because the Indonesia cohort began the program with the highest (47%) dependency on Ford.

Indonesia CampFIRE participants provided a number of cogent explanations for their optimistic outlook, with a particular emphasis on shared responsibility. "Before we thought finance responsibility was for our board, director and financial team. Now every staff thinks about strategic finance as part of their responsibility as well"; and "FIRE learning has encouraged us to involve everybody, not just people from finance, but people in communication and programs, so everyone is alert, which is a plus point." That inward (interior) view was carried into or influenced their outward (exterior) actions: "... we were really scared to let donors know what we actually fund to support our operation, but now with our newly gained knowledge we are able to explain to potential donors that there are costs that need to be covered ... and this is really new because before we were really afraid."

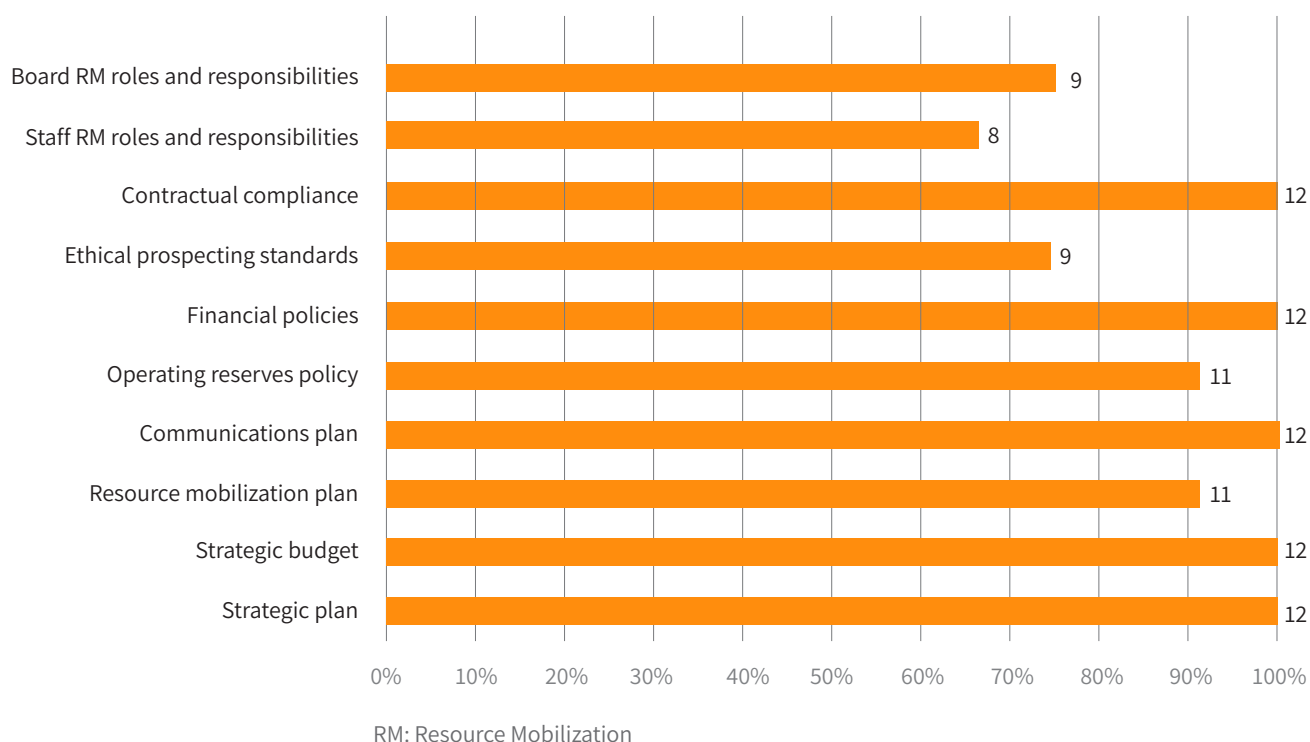
Practice

Policies, plans and practices

Indonesia participants entered the FIRE program with by far the fewest respondents indicating they already had a good policy, plan or practice in place.¹⁸ Although room for improvement was greatest for Indonesia participants, so too were reported improvements.

Indeed, as Figure 17 shows, between eight (67%) and as many as all (100%) either created or updated policies, plans or practices, and attribute this to the FIRE program. As a result, all Indonesia participants now have a strategic plan, an organizational level strategic budget, and a communications plan. And a further 11 (92%) have staff resource mobilization roles and responsibilities, a resource mobilization plan, an operating reserves policy, and financial policies.

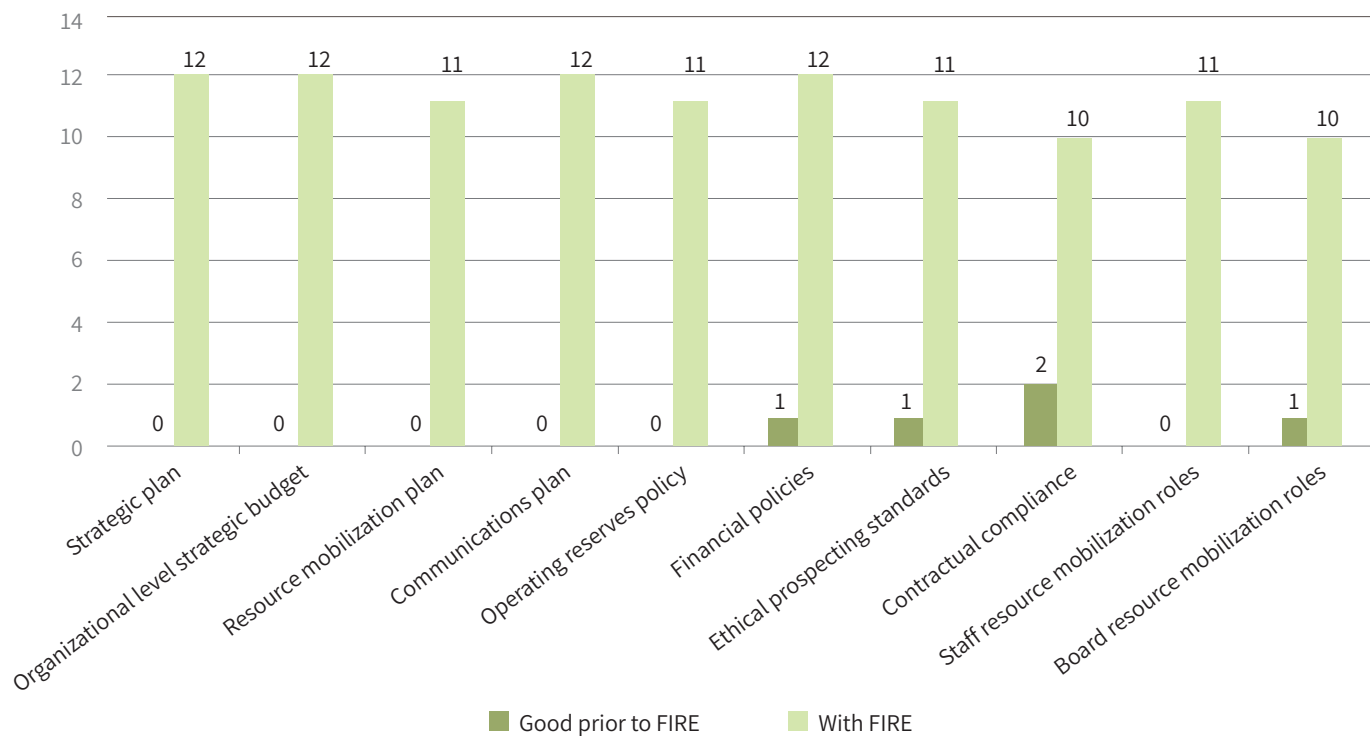
Figure 17. Indonesia: Policies, plans and practices updated and created since FIRE
N=12



¹⁸ Only 1-2 respondents indicated they already had good ones in place prior to FIRE, and only for four of the ten policies, plans and practices.

Figure 18 captures the striking difference in Indonesia respondents' preparedness before and since FIRE in terms of essential components of healthy and strong organizations.

Figure 18. Indonesia: Policies, plans and practices

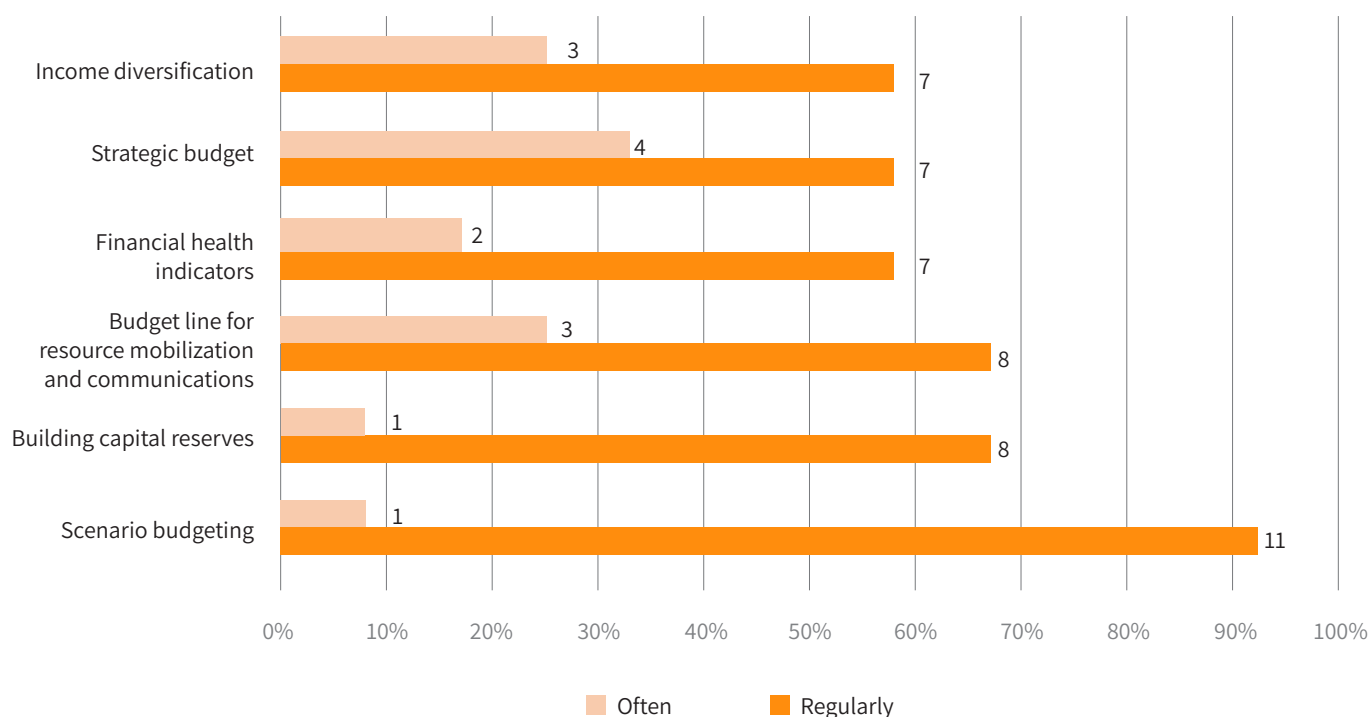


Tools and strategies

Indonesia respondents are also ahead of the other cohorts in the use of new tools and the pursuit of funding strategies. As Figure 19 shows, since FIRE, at least nine (75%) Indonesia respondents reported often or regularly using every one of six FIRE tools, and every respondent indicated often or regular use of scenario budgeting specifically. The serious uptake by Indonesia groups of FIRE tools is noted from the fact that even the least used tools are still used by 75% of respondents: financial health indicators (Diagnostic) and building capital reserves.

Figure 19. Indonesia: Use of tools

N=12



With regard to the FIRE Diagnostic specifically, nine (67%) have fully reviewed and are using the tool to communicate internally, and four (33%) have fully reviewed and started updating it. In fact, Indonesia respondents account for four of the five respondents across all the cohorts who have fully reviewed and started to update the tool.

As shown in Table 11, prior to FIRE only one Indonesia respondent had already been engaged in five of the nine revenue-generating strategies and did not require improvement; another respondent indicated the same for a single strategy. Between one (8%) and five (42%) respondents have introduced improvements to what they had already been doing, and one (8%) to six (50%) have pursued the new strategies, both since FIRE.

Table 11. Indonesia: Revenue generating strategies tried since FIRE

Revenue generating strategies	Already doing and no need to improve		Already doing but improved with FIRE		Tried since FIRE		Successful*	
Joint proposal with other organizations	0	0%	5	42%	3	25%	3	100%
Income-generating service or activity	1	8%	2	17%	6	50%	5	83%
Individual donors, small gifts	1	8%	2	17%	4	33%	4	100%
Individual donors, large gifts	1	8%	0	0%	0	0%	0	--
Corporate contributions	1	8%	1	8%	2	17%	2	100%
Membership dues	1	8%	3	25%	1	8%	1	100%
Online fundraising	1	8%	2	17%	2	17%	1	50%
Impact investing	0	0%	4	33%	1	8%	1	100%

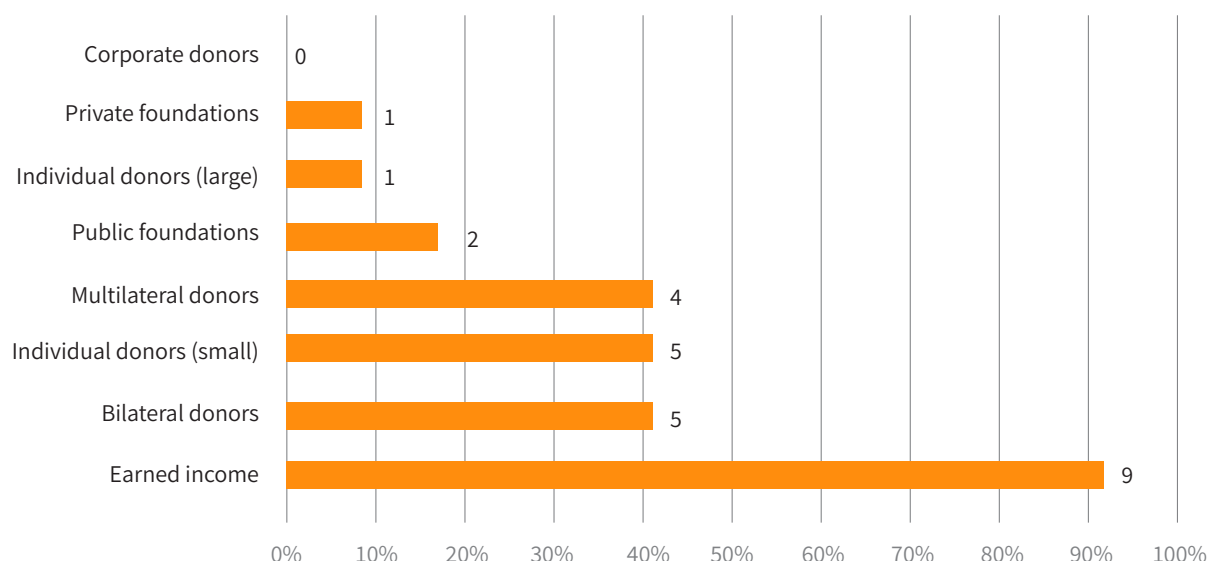
*As a percent of those who tried the new strategy

Since FIRE, at least one participant has tried all the strategies, with the glaring exception of individual large gifts. Notably, since FIRE, more Indonesia respondents (6, 50%) have pursued an income-generating service or activity than any other strategy and were also the only cohort to do so at this point in the program. There is a high rate of success reported for six of the strategies pursued.

As captured in Figure 20, every Indonesia participant has approached at least one funding sector for the first time, as a result of their participation in FIRE. Again, the Indonesia cohort is the only one of the four cohorts in which every respondent has attempted at least one of the eight funding sectors.

Further, Indonesia respondents took on seven of the eight sectors; the next highest is the Brazil cohort, whose participants tried six of the eight sectors. Interestingly, nearly all (11, 92%) have now tried earned income as a result of their participation in FIRE, thereby diversifying their sources of funding and generating unrestricted funds.

Figure 20. Indonesia: Funding sectors approached for the first time
N=12



Donor relations

Prior to FIRE, only two (17%) Indonesia respondents already felt able to communicate confidently with donors. As Table 12 reveals, with the addition of 10 (83%) respondents enabled by FIRE, all now do so. Respondents have also experienced progress in raising with donors both the needs of their organizations as well as those of the field more broadly. Whereas prior to FIRE at most three (25%) had already engaged well with donors on the matters outlined, now between five (42%) and 10 (83%) do so, owing to FIRE.

Table 12. Indonesia: Enabled by FIRE

Actions	Did well prior to FIRE		Doing somewhat or very well since FIRE		Not yet tried		Total	
Communicate more confidently with donors	2	17%	10	83%	0	0%	12	100%
Request the amounts that cover our true costs from donors	1	8%	8	67%	3	25%	12	100%
Engage in conversations with donors about the needs of the field, beyond our own organization	3	25%	5	42%	4	33%	12	100%
Establish dynamic partnerships with donors that go beyond the giving/receiving of grants	3	25%	8	67%	1	8%	12	100%

As will become apparent, prior to FIRE, every cohort was most experienced in raising or negotiating with donors multi-year grants, core support and grants with fewer restrictions. Nevertheless, as Table 13 shows, prior to FIRE at most six (50%) Indonesia respondents had done so. Owing to FIRE, at least two-thirds of Indonesia respondents now have raised or negotiated core support, multi-year grants, and grants with fewer restrictions. Even with regard to the harder asks – starvation cycle, true cost recovery, and capital reserves – Indonesia respondents exhibit increases. For example, whereas prior to FIRE only one (8%) respondent had taken up capital reserves with donors, since FIRE, seven (58%) have done so. However, like the other cohorts, Indonesia participants appear to have had the most difficulty or reluctance raising the issue of starvation cycle with donors, with none having done so before, and only three (25%) doing so since FIRE.

Table 13. Indonesia: Raised or negotiated with donors

Grants related issues	Did prior to FIRE		Now, with FIRE	
Core support	5	42%	9	75%
Starvation cycle	0	0%	3	25%
True cost recovery	1	8%	6	50%
Capital reserves	1	8%	7	58%
Multi-year grants	6	50%	9	75%
Grants with fewer restrictions	3	25%	8	67%

Outcomes

Indonesia respondents attribute several outcomes to FIRE, including, as noted, successful experiences with a number of revenue-generating strategies.¹⁹ That success appears to have resulted in 10 (83%) respondents having raised additional funds owing to their participation in FIRE; by far the highest percentage of any of the four cohorts. However, the Indonesia respondents have also been in the program the longest, thus giving this cohort more time to see results.

Indonesia participants attributed to FIRE yet other positive outcomes. First, the impact of going through the program as a team resulted in the “improvement in the opportunity to collaborate with other units especially for the organization’s benefit and to improve the sense of ownership on organization.” This view was echoed in their and other cohorts’ CampFIRE comments, with a particular emphasis on the element of collective responsibility: “The main impact is how the team is working. Finance, communication and program departments are aligned and together we all think on how to manage and strategize on our plans”; and “An existing common vision for the financial resilience of each staff involved in the FIRE training. A new understanding that the agenda in achieving the organizational financial resilience is a shared task.”

It is evident that Indonesia participants recognize the critical relationship between finance and resource mobilization, on the one hand, and their missions and programs, on the other: “A well monitored internal situation including financial status helps the organization focus better on the program impact”; and “Changes in perspective at the organization by including financial resiliency and sustainability in the organizational strategy.”

Table 14. Indonesia: Revenue generating strategies tried since FIRE

Revenue generating strategies	Tried since FIRE		Successful*	
Individual donors, small gifts	4	33%	4	100%
Joint proposal with other organizations	3	25%	3	100%
Corporate contributions	2	17%	2	100%
Membership dues	1	8%	1	100%
Impact investing	1	8%	1	100%
Income-generating service or activity	6	50%	5	83%
Online fundraising	2	17%	1	50%
Individual donors, large gifts	0	0%	0	--

*As a percent of those who tried the new strategy

2.2.4 MENA

"For me what was very comfortable about the process is that it was always mission driven, not thinking about finance and resource mobilization as disconnected from what we do, but being loyal to what we do, to our mission." (CampFIRE participant)

Eight MENA organizations participated in the FIRE training (June 2020-March 2021), of whom seven (87%) completed most of the survey and six (75%) attended the CampFIRE session:

- Relative to the other cohorts, MENA organizations are young, ranging between six to 17 years in operation. The median age of MENA organizations is 10.5 years, which is half that of the Brazil and Indonesia cohorts.
- MENA organizations are also smaller; only one organization has more than 11-25 staff and volunteers.
- However, the MENA cohort's 2019 median income of \$1.5M is the highest among the four cohorts, with incomes between \$800K-\$4.6M (Appendix E).

Attitude

Like their counterparts, MENA respondents emerged from the FIRE program confident about their future prospects. This is especially notable given that the MENA (and Southern Africa) cohort had only been on the FIRE journey for nine months. On a 10-point scale, MENA participants rated their organizations' prospects for financial resilience and health an average of 7.6, and building and maintaining financial health, 7.8. In another indication of their optimism, four of the seven (57%) respondents believe their dependence on the Ford Foundation will be reduced in the coming two to three years, owing to their participation in FIRE.

¹⁹ They reported success with income-generating service or activity (5, 42%); individual donors, small gifts (4, 33%); and joint proposals with other organizations (3, 25%).

As with the other cohorts, to a large extent the MENA cohort's positive outlook is derived from an understanding of resource mobilization as a collective responsibility. As one CampFIRE participant articulated, "it doesn't have to be just one person freaking out about everything." The challenge thus becomes "how to bring staff into these different parts, so everyone has a role, rather than there is one senior person thinking about all these things." The added benefit is that "it gives staff more a sense of ownership."

Appreciation of FIRE extends to how the program prepares organizations for what lies ahead, with the "help and tools on how to manage the uncertainty." These are described as "really helpful." Participants also experienced the organic relationship between the FIRE program and the world beyond, which is captured nicely by a participant: "the sessions were not unrelated to what is going on in the region, or so region-specific that it ignored the larger, overall picture, so the balance is right."

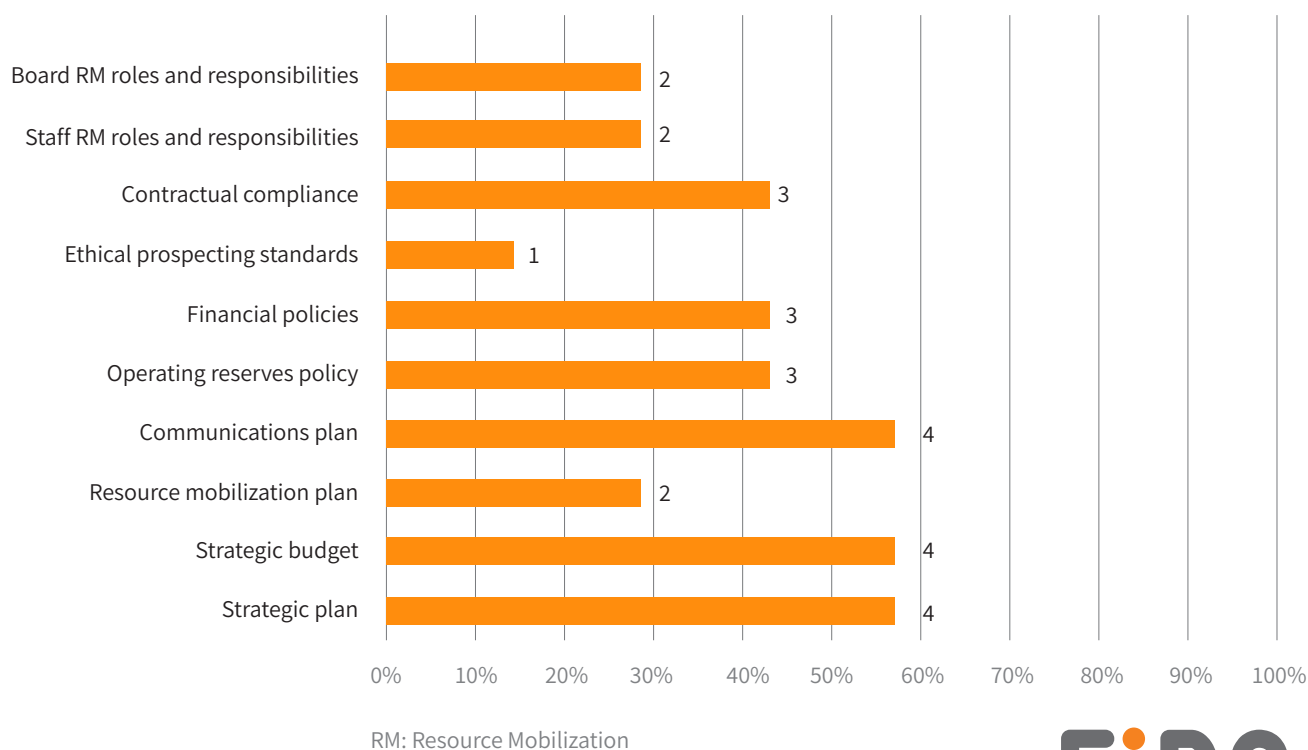
Practice

Policies, plans and practices

Four (57%) MENA respondents entered the FIRE program with good financial policies and ethical standards to prospecting, and fewer began with six of the 10 policies, plans and practices that FIRE emphasizes as needed.

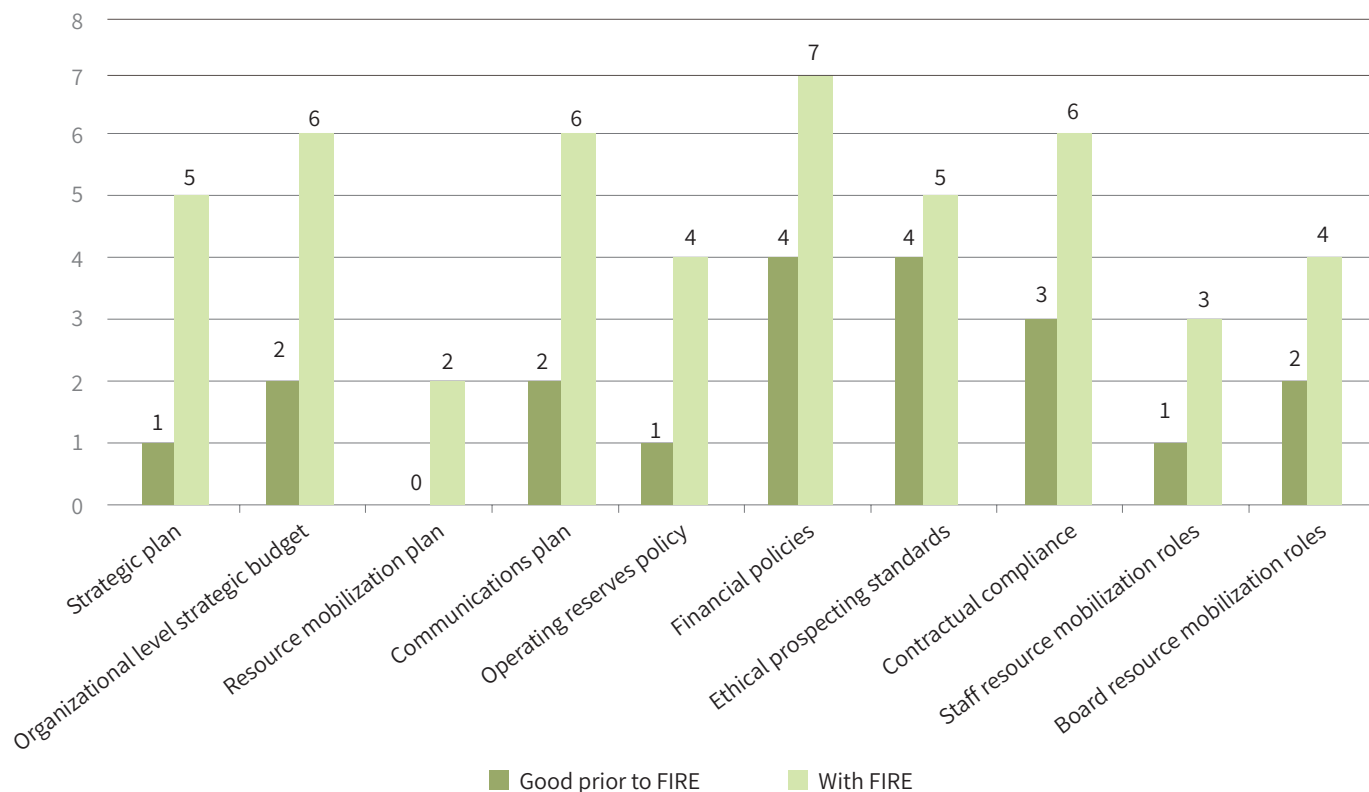
However, as Figure 21 shows, since FIRE, all 10 have been tackled by at least one MENA participant. In particular, four (57%) have created or updated their organizational level strategic budget, strategic plan, and communications plan.

Figure 21. MENA: Policies, plans and practices since FIRE
N=7



The combination of what existed prior to FIRE and what participants have done since is captured in Figure 22.

Figure 22. MENA: Policies, plans and practices



An area that could benefit from future improvement is resource mobilization policies and plans, which the largest number of MENA participants have yet to tackle:

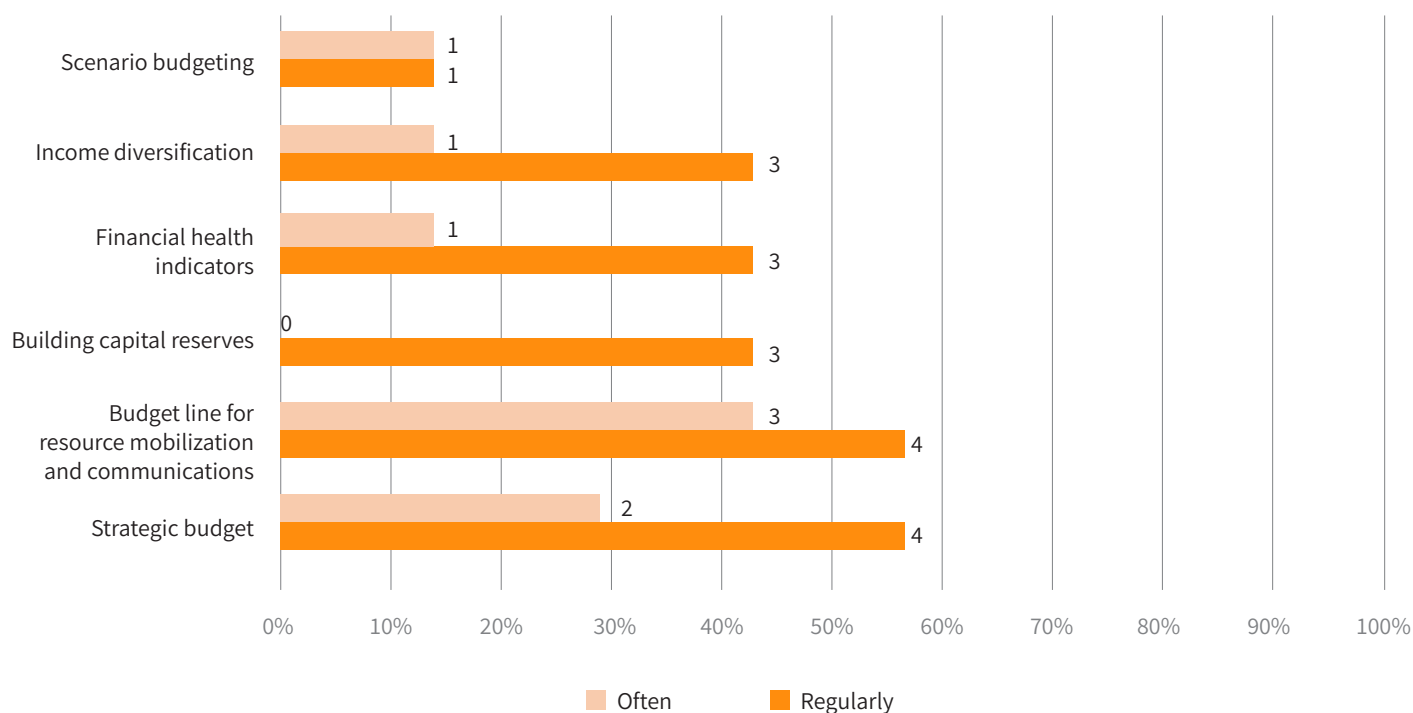
- Resource mobilization plan (5, 71%)
- Staff resource mobilization roles and responsibilities 4, 57%)
- Board resource mobilization roles (3, 43%)

Tools and strategies

As Figure 23 shows, since FIRE, all MENA respondents reported often or regularly using a budget line for resource mobilization and communications, and six (86%) are using strategic budgeting. However, like the other cohorts, use of scenario budgeting is most limited: only one (14%) reported often or regularly using scenario budgeting, and three (43%) have never used it. Further, two (29%) respondents have never used the financial health indicators.

Figure 23. MENA: Use of tools

N=7



Nevertheless, four of the six of MENA respondents have fully reviewed and used the FIRE Diagnostic to communicate internally, and the other two have partially reviewed it.

MENA participants credit FIRE with their pursuit of five of eight revenue-generating strategies. As Table 15 reveals, prior to FIRE, they had engaged with only four of the eight strategies, and by no more than a single organization.²⁰ This is by far the lowest of the four cohorts.²¹ Since FIRE, MENA participants have taken up two strategies in particular: joint proposals with other organizations (5, 71%) and, to a lesser extent, individual small gifts (4, 57%).

²⁰ The four strategies are: joint proposal with other organizations; individual donors, small gifts; individual donors, large gifts; and online fundraising.

²¹ The average prior use of any of the eight strategies is: Southern Africa, 41%; Brazil, 31%; Indonesia, 25%; and MENA, 10%.

Relative to other cohorts, fewer MENA participants (3, 43%) approached funding sectors for the first time as a result of FIRE, and they approached the fewest (3 of the 8) of the sectors listed.²² However, this may well be due to their having already previously engaged with these sectors.

Table 15. MENA: Revenue generating strategies tried since FIRE

Revenue generating strategies	Already doing and no need to improve		Already doing but improved with FIRE		Tried since FIRE		Successful*	
Joint proposal with other organizations	1	14%	0	0%	5	71%	5	100%
Income-generating service or activity	0	0%	0	0%	0	0%	0	--
Individual donors, small gifts	0	0%	1	14%	4	57%	4	100%
Individual donors, large gifts	1	14%	0	0%	0	0%	0	--
Corporate contributions	0	0%	0	0%	2	29%	2	100%
Membership dues	0	0%	0	0%	1	14%	0	0%
Online fundraising	1	14%	0	0%	2	29%	2	100%
Impact investing	0	0%	0	0%	0	0%	0	--

*As a percent of those who tried the new strategy

²² MENA respondents did approach for the first time private foundations (1, 33%); corporate donors (1, 33%); and individual donors (2, 66%).

Donor relations

Encouraging and supporting the establishment of genuine partnerships with donors is a key element of the FIRE program. Prior to FIRE, half of six MENA respondents indicated that they already communicated confidently with donors. As Table 16 reveals, as a result of FIRE now all six do so.

Table 16. MENA: Enabled by FIRE

Actions	Did well prior to FIRE		Doing somewhat or very well since FIRE		Not yet tried		Total	
Communicate more confidently with donors	3	50%	3	50%	0	0%	6	100%
Request the amounts that cover our true costs from donors	2	33%	3	50%	1	17%	6	100%
Engage in conversations with donors about the needs of the field, beyond our own organization	4	67%	2	33%	0	0%	6	100%
Establish dynamic partnerships with donors that go beyond the giving/receiving of grants	2	3%	3	50%	1	17%	6	100%

Besides communicating more confidently with donors, FIRE has enabled more MENA organizations to raise a range of issues with donors, including engaging them around the needs of the field. As Table 17 shows, a larger number is also requesting true costs from donors and establishing dynamic partnerships.

Like the other cohorts, MENA organizations entered the program with the most prior experience bringing the need for core support, multi-year grants, and grants with fewer restrictions to donors. However, since FIRE, they have made notable strides in raising requests for true recovery costs (from 17% to 67%) and capital reserves (from 17% to 50%). Indeed, progress is noted in all categories but one: no MENA organization has raised the starvation cycle with donors.

Table 17. MENA: Raised or negotiated with donors

Grants related issues	Did prior to FIRE		Now, with FIRE	
Core support	3	50%	4	67%
Starvation cycle	0	0%	0	0%
True cost recovery	1	17%	4	67%
Capital reserves	1	17%	3	50%
Multi-year grants	4	67%	5	83%
Grants with fewer restrictions	4	67%	5	83%

Outcomes

MENA respondents attribute several results to FIRE. As noted from Table 18, they had tried five new strategies since FIRE, and did so successfully in all but one case (membership dues). Thus, they not only attempted new revenue generating strategies, even prior to completing the FIRE program, but their efforts also resulted in some successes. However, only two (29%) of the seven MENA respondents indicated that they have already raised more funds owing to participation in FIRE; the lowest among the four cohorts.

Table 18. MENA: Revenue generating strategies tried since FIRE

Revenue generating strategies	Tried since FIRE		Successful*	
Joint proposal with other organizations	5	71%	5	100%
Individual donors, small gifts	4	57%	4	100%
Corporate contributions	2	29%	2	100%
Online fundraising	2	29%	2	100%
Membership dues	1	14%	0	0%
Income-generating service or activity	0	0%	0	--
Individual donors, large gifts	0	0%	0	--
Impact investing	0	0%	0	--

*As a percent of those who tried the new strategy

Survey respondents identified additional consequential outcomes that resulted from going through the program as a team. Several participants described the internal collaboration and cohesion that FIRE strives to catalyze: “We all learnt new aspects of other colleagues’ and departments’ work, which improved our communication and work together”; “FIRE provided space for the team to think and connect more between the organization’s mission, programs, communications”; and “It encouraged us to have more collective discussions; made us realize and understand the perspective of each other.”

2.2.5 Southern Africa

"Strategic budgeting, diverse income and greater reserves will give us more freedom to do what we need to do." (CampFIRE participant)

Eleven Southern Africa organizations participated in the FIRE training (August 202-May 2021), of which nine (82%) completed the survey and seven (63%) attended the CampFIRE session:

- Half of the Southern Africa participants have been working for 15 years or more. However, participating organizations range in age from seven to 42 years.
- In terms of size, this cohort is somewhat in the middle in relation to the other cohorts, with 6-10 to 26-50 staff and volunteers. Nevertheless, as with all four cohorts, the median is 11-25 staff and volunteers.
- These organizations' 2019 income also exhibit a wide range from \$323K to \$3.2M. In this regard Southern Africa participants are most similar to those of Indonesia. However, the median of \$1.1M is nearly double that of Indonesia, and comparable to Brazil's income (Appendix E).

Attitude

Southern Africa respondents emerged from the FIRE program with confidence regarding their future prospects, although somewhat less than their counterparts: on the 10-point scale, the average is 7.4, regarding their organizations' prospects for greater financial resilience and health; and 7.6, for building and maintaining financial health. Their optimism is notable given that Southern Africa participants were relatively new (9 months) to the FIRE journey, and only one (14%) respondent indicated that prior to FIRE they already communicated confidently with donors. Another indicator of respondents' optimism is noted from the fact that five of the nine survey participants (56%) believe their dependence on the Ford Foundation will be reduced in the coming two to three years, owing to their participation in FIRE.

CampFIRE participants shared challenges in the prevailing context emanating from reliance on donors: "We've lost so much because of the changes that donors are doing." However, they also appeared hopeful having acquired means with which to compensate that include "everyone now understands that we have to be on board, all of us." Affirming that "you really have to put your all, and the FIRE journey has helped me to see that," participants forwarded examples of new collective efforts that include mobilizing staff to carry out "research on potential donors and trying to see if we can get potential funding from them." Addressing the executive director of the organization, one participant underscored what collective engagement on resource mobilization enables: "Staff will be able to assist you and support you and it will become easier in terms of success; and in terms of failures, the stress will be shared, so it's not on you alone."

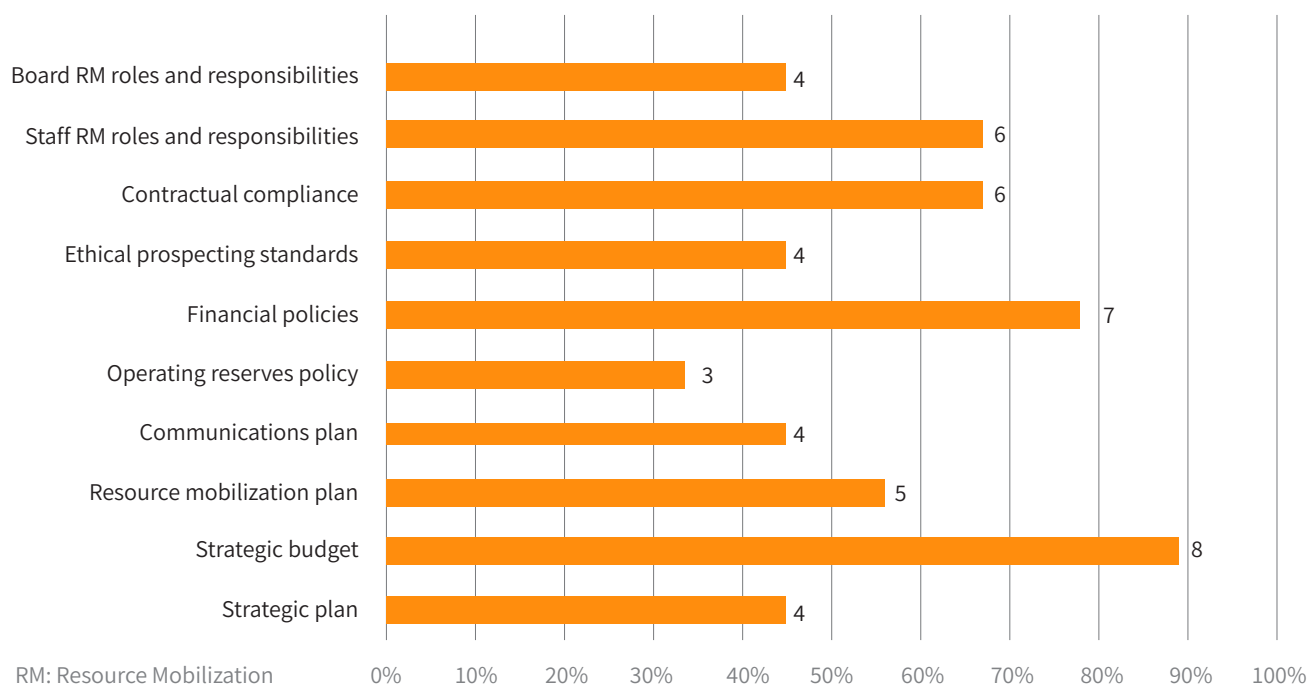
Practice

Policies, plans and practices

When Southern Africa respondents entered the FIRE program, four (44%) already had a good operating reserves policy and three (33%) had a good strategic plan. None reported having either good financial policies or good communication plans prior to the FIRE. Figure 24 shows that since FIRE, however, between three (33%) and eight (89%) respondents now have one or more of the 10 policies, plans, and practices that FIRE emphasizes in place.

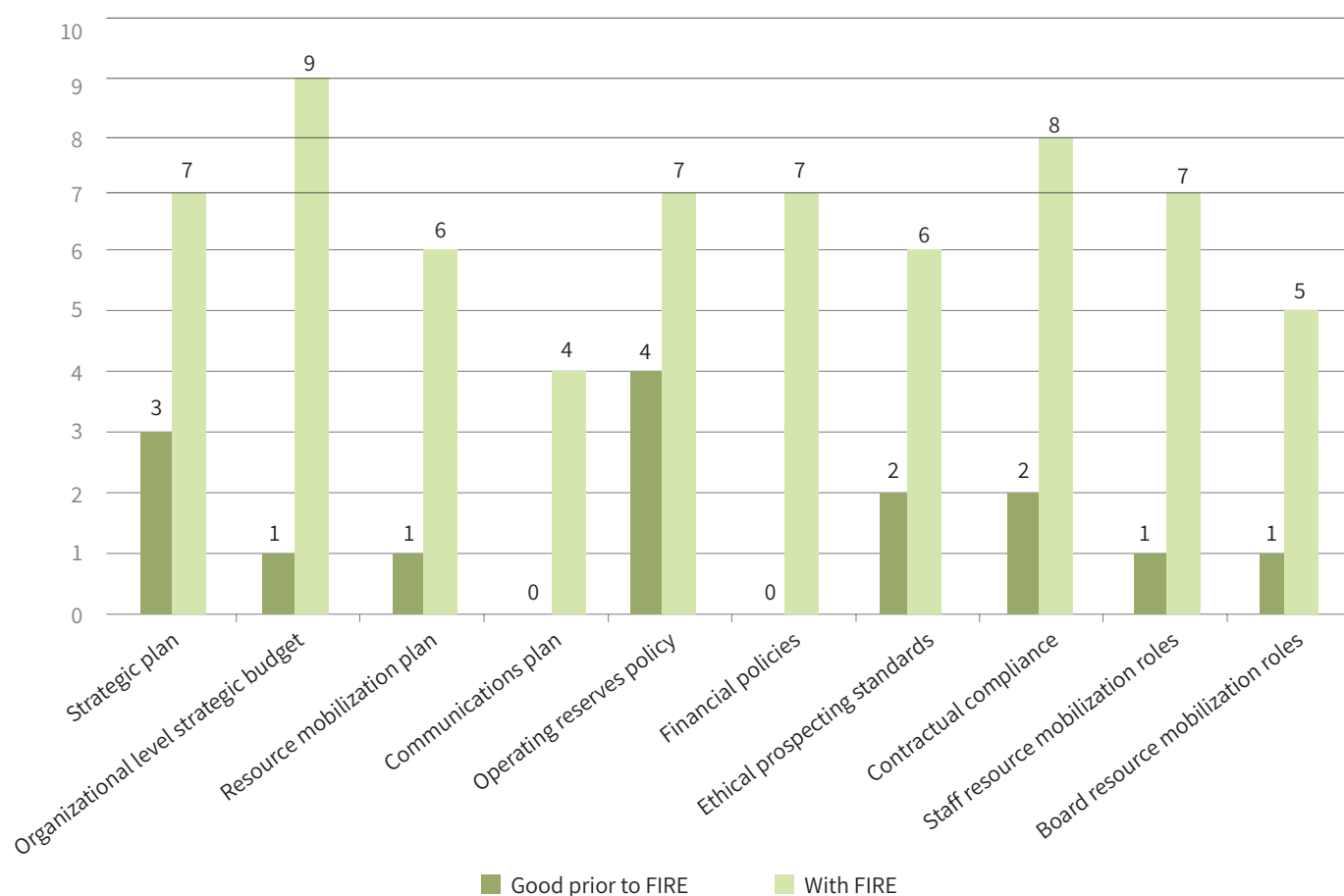
Figure 24. Southern Africa: Policies, plans and practices since FIRE

N=9



Most notably, eight (89%) have created or updated an organizational level strategic budget, and seven (78%) financial policies. Even four (44%) report now having a communication plan. Organizations have also spelled out the resource mobilization roles and responsibilities both for their staff (6, 67%) and their boards (4, 44%). Figure 25 captures FIRE's contribution to expanding the number of organizations that now have these essential elements of effective organizations.

Figure 25. Southern Africa: Policies, plans and practices



Tools and strategies

As Figure 26 reveals, since FIRE, Southern Africa respondents reported quite high rates of using essential tools, with at least one-third often or regularly using all tools. The tools most used are strategic budgeting and income diversification, both often or regularly used by eight (89%) respondents. Scenario budgeting is the tool least used often or regularly by respondents (3, 33%).

Five (56%) respondents report using the FIRE Diagnostic often or regularly, and all have at least partially reviewed the tool, with three (38%) having fully reviewed and used it to communicate internally, and one (13%) having fully reviewed and started to update it.

Figure 26. Southern Africa: Use of tools

N=9

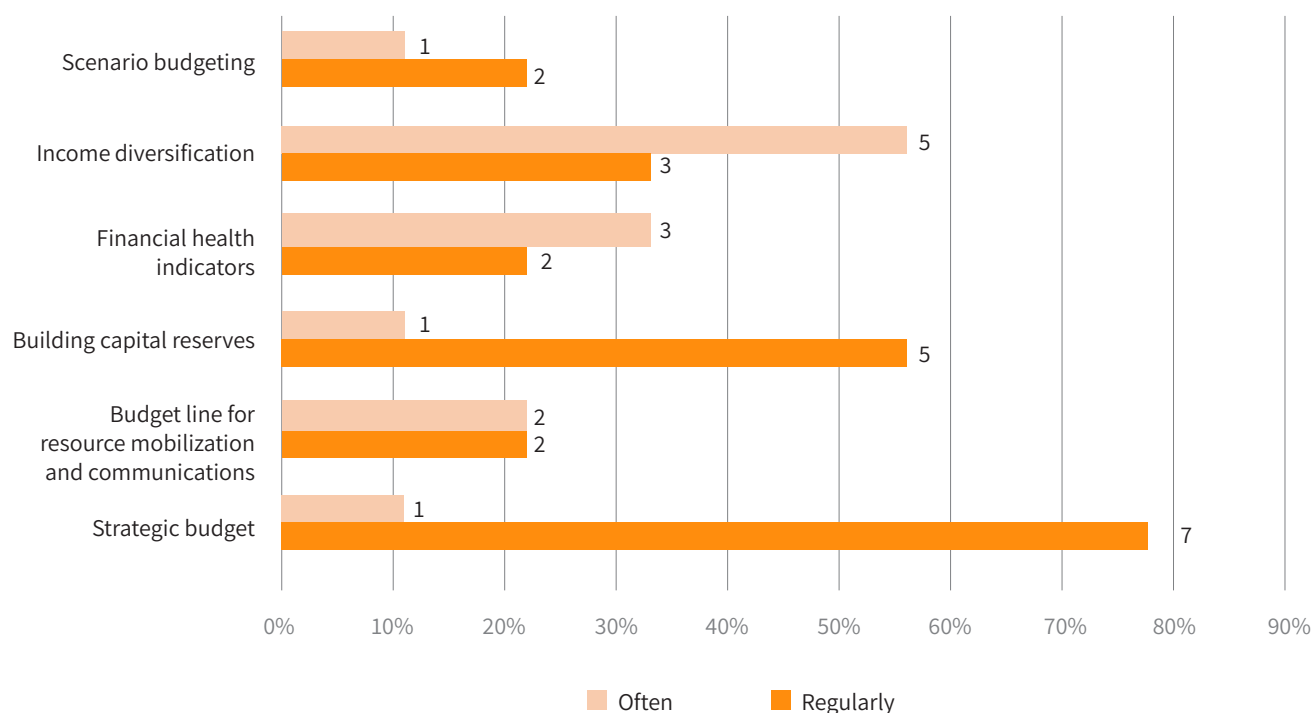


Table 19 shows that prior to FIRE very few (1-2) respondents described already doing well in five of eight revenue-generating strategies covered by FIRE, and therefore were not in need of FIRE assistance. However, considerably more respondents indicated that FIRE had improved their use of seven of the strategies they had pursued previously, and several more tried strategies for the first time. All those who took on three of the new strategies – individual donors small gifts, corporate contributions, and membership dues – reported doing so successfully. However, success with the strategy of large gifts from individual donors was mixed, with one successful and the other not. Further, joint proposal writing, the strategy tried by the most respondents (3, 33%), has not yielded success as of yet.²³

²³ Two strategies attempted by the fewest respondents are membership dues and online fundraising; seven (78%) indicated they had not yet tackled either strategy.

Table 19. Southern Africa: Revenue generating strategies tried since FIRE

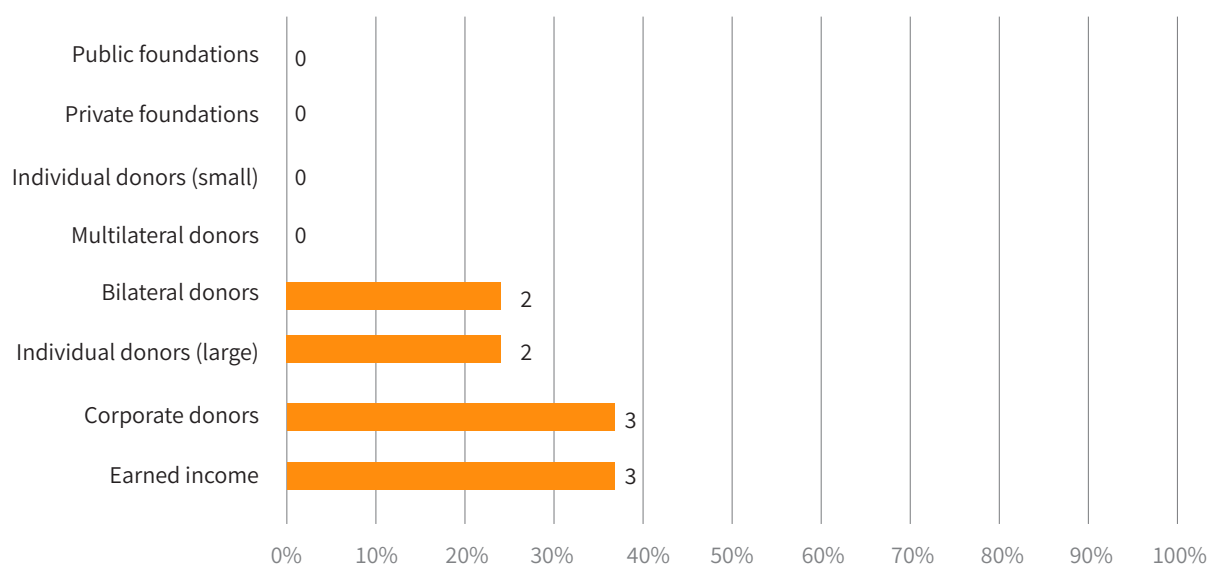
Revenue generating strategies	Already doing and no need to improve		Already doing but improved with FIRE		Tried since FIRE		Successful*	
Joint proposal with other organizations	1	11%	3	33%	3	33%	3	0%
Income-generating service or activity	2	22%	3	33%	3	33%	0	--
Individual donors, small gifts	1	11%	4	22%	2	22%	1	100%
Individual donors, large gifts	1	11%	4	22%	2	22%	2	50%
Corporate contributions	2	22%	1	11%	1	11%	1	100%
Membership dues	0	0%	0	0%	0	0%	1	100%
Online fundraising	0	0%	2	22%	2	22%	0	--
Impact investing	0	0%	2	22%	2	22%	0	--

*As a percent of those who tried the new strategy

Figure 27 shows that eight of the nine (89%) respondents approached four funding sectors for the first time as a result of FIRE.²⁴ Interestingly, the two (25%) Southern Africa participants, who approached bilateral donors for the first time, account for three of the five participants across the four cohorts who did so.

Figure 27. Southern Africa: Funding sectors approached for the first time

N=8



²⁴ One respondent appears to have tried two for the first time.

Donor relations

As mentioned earlier, only one (14%) Southern Africa respondent indicated that they communicated confidently with donors before the program.

As Table 20 shows, since FIRE, all respondents report now communicating confidently somewhat or very well. Moreover, the number of participants now doing well in raising their needs (e.g., true costs) with donors, engaging in conversations about the needs of the field more broadly, and establishing dynamic partnerships with donors has doubled, with at least six (86%) of the Southern Africa participants report doing these things well.

Table 20. Southern Africa: Enabled by FIRE

Actions	Did well prior to FIRE		Doing somewhat or very well since FIRE		Not yet tried		Total	
Communicate more confidently with donors	1	14%	6	86%	0	0%	7	100%
Request the amounts that cover our true costs from donors	2	29%	5	71%	0	10%	7	100%
Engage in conversations with donors about the needs of the field, beyond our own organization	2	29%	4	57%	1	14%	7	100%
Establish dynamic partnerships with donors that go beyond the giving/receiving of grants	2	29%	4	57%	1	14%	7	100%

Consistent with the other cohorts, Southern Africa respondents are more likely to have discussed with donors core support, multi-year grants and/or grants with fewer restrictions than other issues. However, as Table 21 indicates, prior to FIRE only half (4) raised the need for core support with donors, and even fewer multi-year grants (3, 38%) and reduced restrictions on grants (3, 38%). Since FIRE, all have raised or negotiated not only core support and multi-year grants, but seven (88%) have also discussed capital

Table 21. Southern Africa: Raised or negotiated with donors

Grants related issues	Did prior to FIRE		Now, with FIRE	
Core support	4	50%	8	100%
Starvation cycle	2	50%	3	38%
True cost recovery	2	25%	6	75%
Capital reserves	2	25%	7	88%
Multi-year grants	3	38%	8	100%
Grants with fewer restrictions	3	38%	6	75%

reserves, and six (75%) true cost recovery, with donors. And like the other cohorts, respondents were least likely to raise the starvation cycle with donors, with only one (13%) additional respondent having taken this on.

Outcomes

Southern Africa participants attribute to FIRE a number of encouraging outcomes. As noted, and shown in Table 22, several have tried five new strategies; all three who pursued individual donors small gifts, corporate contributions, and membership dues reported doing so successfully; and one experienced success with large gift donors. Further, five (56%) Southern Africa respondents report that they have already raised more funds.

Southern Africa respondents identified consequential changes that they “have already begun to see as a result of the FIRE program,” including the impact of going through the FIRE experience. One

Table 22. Southern Africa: Revenue generating strategies tried since FIRE

Revenue generating strategies	Tried since FIRE		Successful*	
Individual donors, small gifts	1	11%	1	100%
Corporate contributions	1	11%	1	100%
Membership dues	1	11%	1	100%
Individual donors, large gifts	2	22%	1	50%
Joint proposal with other organizations	3	33%	0	0%
Online fundraising	0	0%	0	--
Impact investing	0	0%	0	--
Income-generating service or activity	0	0%	0	--

*As a percent of those who tried the new strategy

respondent described the “synergy” generated by having “Finance, Business Development, Marketing/ Communications in one room to think and talk about Financial Resiliency.”

Echoing this view, another respondent described “building an integrated approach to financial resilience.” One survey respondent captured the experience and value of cohering as a team this way: “As a team we have learned to reflect and plan together about our finances. We have also gained an appreciation of how each staff member has a stake in ensuring that the organization is financially resilient.” Respondents credit FIRE, which “helped us understand our finances and set realistic goals for our financial sustainability,” and express feeling better prepared for the future owing to their being “fully aware now of what it takes and going into the next phase of building with our eyes wide open.”

2.3 Keeping Momentum

Spring plans to carry out follow-up surveys with the four cohorts at one- and two-year intervals after completion of the FIRE program. The FIRE participants' journey continues, and although they have demonstrated real progress on a number of different fronts, it will take time for them to achieve enduring change, and begin to contribute to transforming the funding ecosystem. Already, however, the organizations have plans for continuing the financial resilience work they have started.

Survey respondents identified the revenue generating strategies they intend to pursue in the near future. Importantly, Table 23 and Figure 28 indicate that every cohort reported planning to pursue every strategy covered by FIRE. Respondents show particular interest in pursuing joint proposals with partners (35, 85%); income-generating strategies (31, 76%); and small gifts by individual donors (30, 73%).

Table 23. Revenue strategies to be tried in the near future

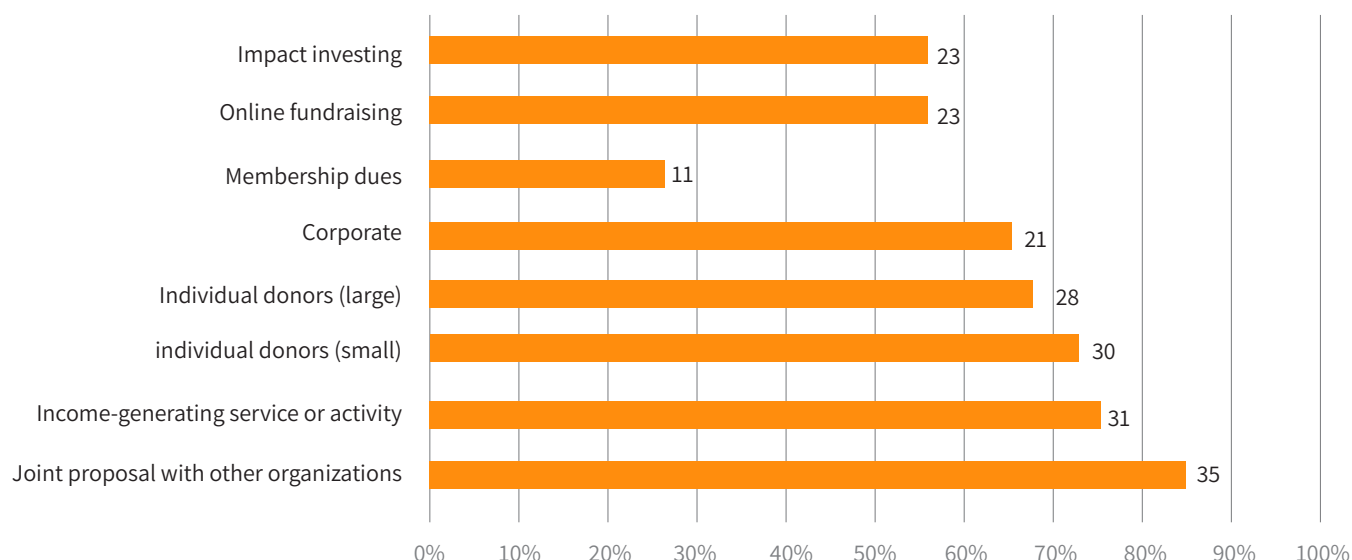
Revenue generating strategies	Brazil*		Indonesia*		MENA*		Southern Africa*		All Cohorts**	
Joint grant proposal with partners	12	100%	9	82%	6	86%	8	100%	35	85%
Income-generating service, activity or product sales	8	80%	11	100%	5	100%	7	78%	31	76%
Individual donors, small gifts	10	77%	8	73%	6	100%	6	75%	30	73%
Individual donors, large gifts	9	82%	8	73%	4	80%	7	88%	28	68%
Corporate contributions	7	70%	8	80%	5	83%	7	78%	27	66%
Membership dues	4	50%	4	36%	2	33%	1	13%	11	27%
Online fundraising	8	89%	6	67%	4	67%	5	63%	23	56%
Impact investing	8	80%	8	80%	3	75%	4	80%	23	56%

*Percentage calculated excludes "Don't Know"

**Percentage calculated includes "Don't Know" (Total=41)

Figure 28. Resource mobilization strategies to be tried in the near future

N=41



As described earlier, CampFIRE participants attributed to FIRE a range of important developments that include greater strategic planning, collaboration, integration, and sharing of responsibilities, among other things. To sustain these and other internal improvements in outlook, approaches, practices, and more, FIRE emphasizes the importance of ongoing application of learnings as essential for success and transformation. Respondents were thus queried about the means and mechanisms they have introduced to ensure ongoing learning and that this is carried forward – essential for long-term results.

FIRE encourages organizations to maintain the “pivot team” that was formed when three staff members key to resource mobilization – the executive director, senior finance person, and a third person²⁵ – participated in the training. As Table 24 indicates, this is an area where more work is required. Only about a quarter (10, 26%) of respondents have established a pivot team to oversee the continued application of learnings moving forward. This varies considerably from none of the MENA participants to nearly half of the Brazil groups (6, 46%).

²⁵ Roper, “Spring Forward,” p. 19.

Table 24. Ongoing FIRE efforts to keep momentum

Actions	Brazil		Indonesia		MENA		Southern Africa		All Cohorts	
We have not yet done this	3	23%	0	0%	1	17%	2	25%	6	15%
We have established a FIRE/ pivot team to lead these efforts	6	46%	3	25%	0	0%	1	13%	10	26%
We meet regularly (weekly/ monthly) to follow up on FIRE related activities	5	38%	8	67%	3	50%	1	13%	17	44%
The introductory training for new staff includes a review of FIRE resources	0	0%	2	17%	1	17%	0	0%	3	8%
Processes are in place to share FIRE related information across teams/ departments	4	31%	8	67%	2	33%	4	50%	18	46%
We have invested financial and human resources in ensuring continued FIRE work	2	15%	4	33%	1	17%	1	13%	8	21%
Answered	13		12		6		8		39	100%

As Table 25 shows, the vast majority (34, 87%) of participants have introduced at least one of the five suggestions for ensuring that learning is passed on, and 25 (64%) participants have implemented at least two of them.

In a number of important ways, FIRE participants also plan to share the knowledge and benefits of the program with others. As one respondent indicated, “Since the nature of the organization involves supporting rights-defending organizations, including movements, collectives and grassroots organizations, we intend to relay FIRE knowledge to the entities we support. We already have social investment assistants, set to provide this specific support, and we will maintain workshops on financial resilience and fundraising by incorporating the FIRE lessons we learned.” Further, the FIRE approach has provided a model for effective training. A MENA CampFIRE participant, whose organization runs training programs for its grantees, shared that “it was interesting to see how there was ‘leaking’ in what we were learning from the FIRE program to the grantees – both intentional and not intentional. Sometimes deliberate in how to transmit the knowledge and experience to others in a very peer-to-peer level, so we are learning too. How to speak to grantees about governance, a certain level that we should be pushing to have, without being patronizing...” Continuing, the participant described the process as “organic, and a mixture of learning and teaching and transmitting experiences and learning from other experiences.”

Table 25. Approaches incorporated to ensure learning and change are passed on

Number of approaches	All Cohorts	
0	5	13%
1	18	46%
2	7	18%
3	6	15%
4	3	8%
Total	39	100%

3.0 Learnings

A Brazil survey respondent provided a succinct yet comprehensive description of the FIRE program and team that echoes the views and sentiments of a wide range of program participants:

“The team is highly dedicated to the needs of organizations, with up-to-date and interesting finance tools (such as the diagnosis, the approach on the influence of personal beliefs on the organizational real, financial indicators, communication techniques etc.) They turned this program into something very different from what we usually find in this realm of financial training or qualification. Meetings with consultants were great and provided insights from different perspectives on the organizational culture and even helped us to see points we had not even conceived of before. Also, sharing with other organizations was an interesting experience. It would be good to think about a new step into the program, with more time for the organizations to share a bit more information or to delve into certain themes.”

As Spring’s highly dedicated team prepares for the next phase of the FIRE program, a number of

learnings merit emphasis or attention.

First, there is a need for robust baseline data to assess progress over time. The pre-intensive survey introduced early in the program proved unreliable in providing accurate information: this survey is being revised.

To increase accuracy, the survey should be shortened and simplified, and the questions must be clear and straightforward. In developing it, the team must also distinguish between information it would like to have and information it needs to have, in order to avoid a survey that requires too much time to complete, risks loss of precision in translation, and is unwieldy in analysis. As well, care will be needed to ensure that the right people in the organizations complete the survey.

Second, the Diagnostic, based on financial statements, is an innovative and powerful FIRE tool and key component of baseline data. Ideally these diagnostics are developed at the start of the program. However, the FIRE team learned from experience the need to establish trust with participants before requesting organizational documents, particularly financial ones. Greater effort in describing the value of the tool, possibly even enlisting previous participants who have gone through the process, is an effort is worth exploring.

Third, local coaches in the respective cohort regions are a key factor in the program's effectiveness. Among other things, they are aware of the specificity of opportunities and challenges of each context, and what participants are likely to encounter and need. Coaches bring deep knowledge of the respective contexts and serve the participating organizations and the FIRE program well. They also capture the nuances that are key to assessing progress over time. Brazil, Indonesia and MENA had teams with strong local presence and coaches, whereas the Southern Africa team had only one representative from the region. In all regions the partnership with regional Ford Foundation staff proved critical in understanding the specific context and dynamics as well.

Fourth, participants clearly value the opportunity to connect with others in their cohort as well as to learn about counterparts in other regions of the world through FIRE. As a MENA CampFIRE participant put it: "Having this process of being together and in touch with each other and others outside the region was soothing, felt that we're not alone in this drama." Arguably, these sorts of connections and links are also essential for Spring's aspiration for a transformed funding ecosystem. A desire for more such opportunities was heard during the CampFIREs and shared in survey responses.

Fifth, FIRE stresses the importance of leadership in driving sustained change and carry the "new normal" forward. As the FIRE team has already noted, it would be good to introduce elements of FIRE's valuable guidance on leadership practice gradually and earlier in the program, such that when that module is then taken up, it is experienced as an ah-ha moment.

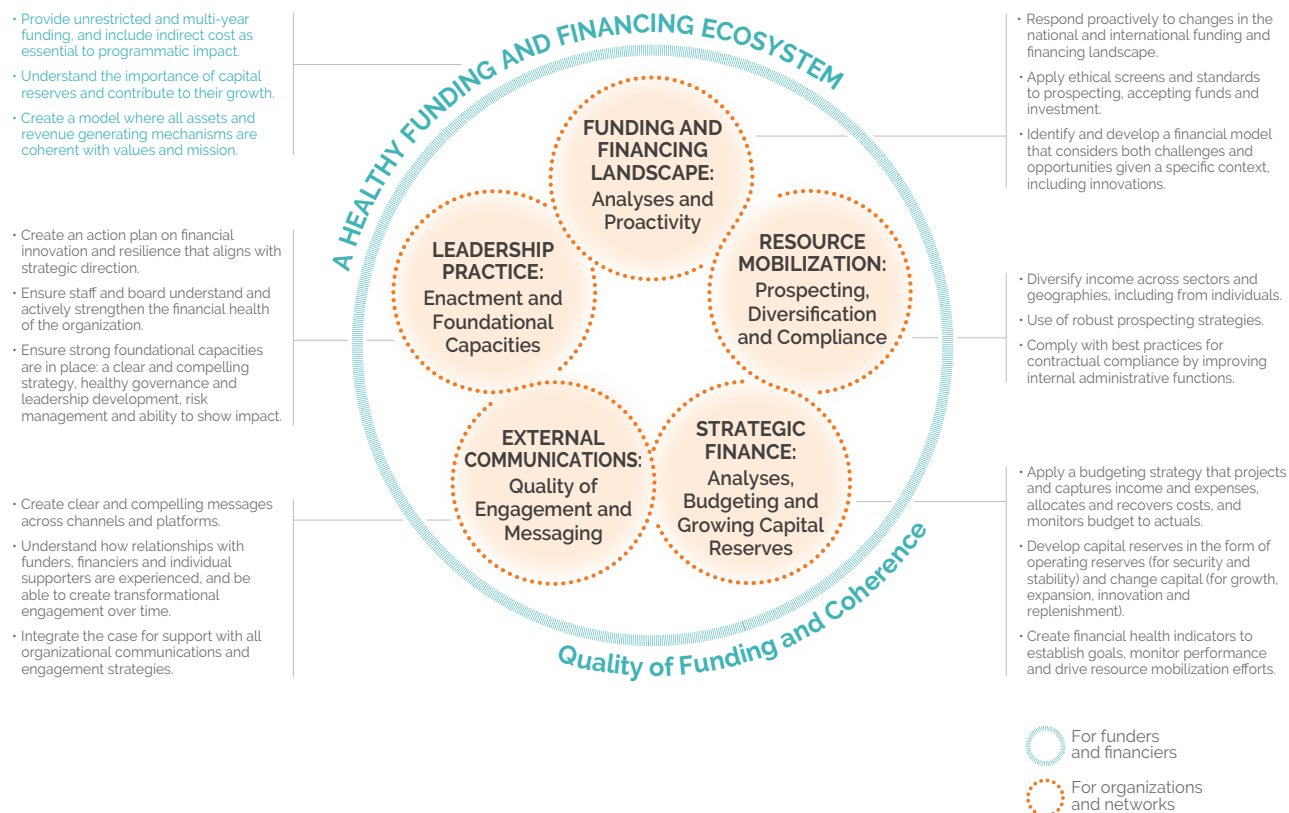
Finally, although participating organizations' commitment to and participation in the FIRE sessions has been tremendous, it may yet be improved. A survey respondent suggested, "To be clearer from the beginning about the number of sessions and the time needed for them." This may also be helpful in

ensuring that the pivot team formed to participate in the program continues thereafter.

4.0 Appendices

A. FIRE Framework

FIRE - Financial Innovation and Resilience Framework



B. Change Domains

<div>Inner Meaning & Beliefs</div> <ul style="list-style-type: none">• The "why" of financial resilience is clear; it inspires and aligns with purpose• Assumptions are surfaced and revisited, leading to greater self-awareness• Understanding of the importance of working at the intersections of functional areas.	<div>Action & Achievement</div> <ul style="list-style-type: none">• Key tools and financial health indicators are in place.• New skills are developed, and new practices introduced• Innovation, risk-taking and learning is encouraged
<div>Relationships & Culture</div> <ul style="list-style-type: none">• A team of three (or four) members of staff, across functional areas are driving the organizational change process• Inspired and creative engagement of staff and board takes place• Transformational relationships are built and maintained, including with supporters and funders	<div>Systems & Structure</div> <ul style="list-style-type: none">• Proactive analysis and response to changes in funding/ financing landscape; innovative financial models are explored• Action plan is developed, implemented and monitored with clear staff roles/responsibilities• Ongoing knowledge-building in the four areas of the FIRE Framework

C. Materials reviewed

FIRE training materials

FIRE Action Plan Workbook Template

FIRE External Communications: Messaging Rights and Justice Work for Support, September 14, 2020 (PPT)

Keeping momentum: Leadership Practice, Nov 4-6, 2020 (PPT)

Pitch Exercise Instructions Handout

Primer 1: Intro to FIRE English

Primer 2: Funding and Financing Landscape

Primer 3: Resource Development

Primer 4: Strategic Finance

Primer 5: External Communications

FIRE program evaluation and evaluation materials

A set of indicators developed in 2019 (not implemented)

Brief Overview & Learnings Ford Foundation Technology & Society Program, May 2021

BUILD Diagnostic Summary 4 cohorts Mar 9

Diagnostic trends from Brazil, MENA, Indonesia and Southern Africa cohorts Produced by Nancy Natilson and Adriana Moura, February-March 2021

ES FIRE Evaluation Framework (PPT)

FIRE 2.0 South Africa 2020 program proposal July 13 - shared

FIRE Diagnostic, 4justfuture, August 2020

FIRE MENA BUILD Program Plan June 2 2020

FIRE Program Brazil 2020-2021 version June 7 2020

FIRE PROGRESS and PROCESS Markers for Sustained Change, September 24, 2020

FIRE_2019 set of indicators (Excel)

Laura Roper, "Spring Forward: Evaluation of Spring Strategies' Financial Sustainability Program," January 2016.

Niras, "Interim Report: BUILD Developmental Evaluation," September 2020

Revised Closeout Campfire Session Questions and Agenda Template v Febr. 28

Spring Strategies: 2020 M&E Framework [FIRE_monitoring_2020.xlsx]

The project plan for the Impact stories and two FIRE Impact Stories: KotaKita & Akili Dada.

Additional resources

FIRE website and FIRE Learning LAB.

D. FIRE Claims

LEARN

- Key concepts and why they matter. Strategic Finance concepts including diversification, starvation cycle, true cost recovery, transactional & transformational relationships with funders (ladder of engagement) Gut-Head-Heart framework.
- Key financial indicators and how to use these to assess needs and strategize accordingly.
- Action-logics of different funding sectors and their implications.
- New ways of approaching resource mobilization. A diversified financial model grounded in specific context, opportunities and challenges.
- Diversification might include contributed income (different sectors and geographies, including from individuals) earned income and financing.
- How to build financial resilience capacity [Everyone in the organization has a role, breaking down silos, need to invest in resource mobilization and communication capacity, etc.].

FEEL – EXPERIENCE

- Power of approaching financial sustainability and resilience as a team/organizational responsibility and effort (and feeling less alone as a result).
- Self-awareness regarding how their own views about money shape how they look at fundraising and finance.
- Confidence that financial resilience is achievable with the tools and knowledge they are acquiring.
- Confidence to ask for what the organization needs.
- Capital reserves are established and growing in the form of operating reserves (for security and stability) and change capital (for growth, expansion, innovation and replenishment).
- Confidence to explore new ways, approaches, tools, etc. and even to innovate.
- Generating greater, mission aligned impact.
- Encouragement that capital reserves are important and permission to start and grow where most appropriate for the organization.

DO

- Set up a team of three to four staff across functional areas (Pivot team).
- Use knowledge and tools to anticipate and analyze changes in the funding and financing landscape.
- Respond proactively to changes in the funding and financing landscape.
- Use robust real-time prospecting strategies.
- Pursue opportunities for diversification.
- Apply ethical screens and standards to prospecting, accepting funds and investment.
- Develop robust budgeting strategy. (Projects and captures income, costs and recovery of true costs)
- Create and monitor progress of financial health indicators (dashboard).
- Use financial health indicators to drive resource mobilization efforts.

LEARN

- How to start / grow / manage / invest capital reserves.
- How to communicate more effectively.
- How to cultivate good/ transformative donor relationships.

FEEL – EXPERIENCE

- Comfort with viewing financial resilience as inherent to the work of the organization, integral to purpose and strategy.
- Inspiration from understanding the WHY of financial resilience, how it is integral to purpose. (The two wheels of the bicycle).
- Reassurance and greater ease from knowing that they have been introduced to everything involved in building greater financial strength.
- Perceives resource mobilization and communications as investment with expected monetary returns (rather than expense).
- Individuals feeling inspired as they themselves present and tell the story of the organization (Being affected themselves using the GHH framework, breathing new life into their own relationship with the organization.)
- Financial staff feeling greater self-worth, feeling seen, respected and listened to.

DO

- Create an action plan on financial innovation and resilience that aligns with strategic direction.
- Create/review/update relevant plans, invest in resource mobilization and communication capacity, take steps toward building operating and capital reserves, etc.
- Create effective messaging across multiple channels and platforms.
- Integrate case for support across all organizational communications and engagements.
- Pursue new and targeted approaches in relationships with donors.
- Comply with best practices for contractual compliance by improving internal administrative function.
- Encouragement of innovation, creativity, risk taking and learning on FIRE related topics.

E. Cohort Details

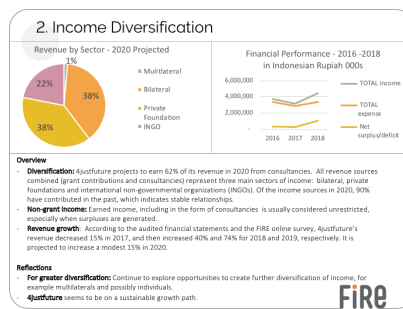
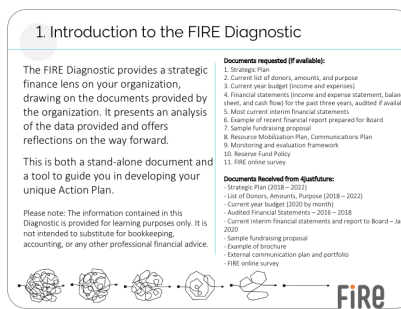
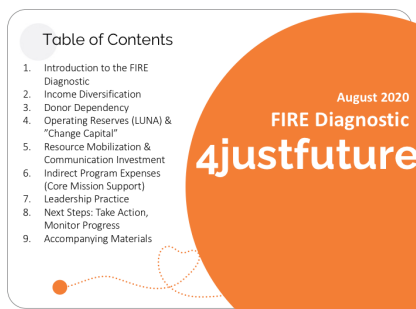
Cohort*	Years in operation		Number of staff and volunteers		Annual income in 2019 (\$US)	
	Range	Median	Range	Median	Range	Median
Brazil	9 - 60	21	11 - 76+	11 - 25 range	\$605K - \$11M	\$1.2M
Indonesia	9 - 41	22	1 - 76+	11 - 25 range	\$242K - \$3.6M	\$600K
MENA	6 - 17	10.5	1 - 76+	11 - 25 range	\$800K - \$4.6M	\$1.5M
Southern Africa	7 - 42	15	6 - 50	11 - 25 range	\$323K - \$3.2M	\$1.1M

*For those with reported figures

F. Diagnostic

Documents that form the basis of the Diagnostic:

1. Strategic Plan
2. Current list of donors, amounts, and purpose
3. Current year budget (income and expenses)
4. Financial statements (income and expense statement, balance sheet, and cash flow) for the past three years, audited if available
5. Most current interim financial statements
6. Example of recent financial report prepared for Board
7. Sample fundraising proposal
8. Resource Mobilization Plan, Communications Plan
9. Monitoring and evaluation framework
10. Reserve Fund Policy
11. FIRE online survey



Financial Health Indicators (6)

INDICATORS	Celebrate	Monitor	Take Action
Donor Dependency	20% or less	21% to 49%	50% or more
Operating Reserves (LUNA Months-on-Hand)	3.00 to 6.00	1.00 to 2.99	Less than 1.00
Change Capital	50% - 100%	10% to 50%	Less than 10%
Resource Mobilization & Communications Investment	10% - 15%	5% to 10%	Less than 5%
Core Mission Support Investment	15% - 25%	10% to 15%	Less than 10%
Budget Variances	10% or less	11% to 19%	20% or More

G. Cohort FIRE Program Details

Cohort	Participants at start	Participants at end	FIRE Program	Type of Intensive	Date of Program	Diagnostic	Attended CampFIRE	Took the Close-out Survey
Brazil	14 orgs	14 orgs	3	2 days	(8 months) Dec 2019 - Feb 21	(14 produced) October 2020	14 orgs (100%)	13 orgs (93%)
Indonesia	13 orgs	13 orgs	3	4 days	(12 months) Oct 2019 - Feb 21	(13 produced) May 2020	9 orgs (69%)	12 orgs (92%)
MENA	8 orgs	8 orgs	3	No intensive	(10 months) June 2020 - Mar 21	(8 produced) September 2020	6 orgs (75%)	7 orgs (87%)
Southern Africa	12 orgs	11 orgs	2	3 days	(10 months) Aug 2020 - May 21	(11 produced) November 2020	7 orgs (58%)	9 orgs (81%)