

FIRST NATIONS
DEVELOPMENT INSTITUTE

CALIFORNIA
TRIBAL FUND

insights & bites



September 2025 - July 2026

The California Tribal Fund will be hosting 6 webinars over the course of a year. Each session will go over different topics to support grantees overall learning and growth.

OUR TEAM



REBECCA TORTES

Director

Cahuilla, Payómkawichum,
and Assiniboine Sioux



DONALD SALCEDO

Lead Program Officer

Quechan Nation/ Pueblo of
Laguna



ELLA KOHLER

Program Officer

Sac & Fox

MISSION & VISION



Our mission is to invest in the viability and visibility of California Tribal Nations and communities.



We envision a future where California Native People — here since time immemorial — have authority over our homelands and honor our responsibility to our people, language and traditions to ensure our communities are recognized, strengthened and sustained.



OUR PROGRAM AREAS



Stewardship of Ancestral Lands & Waters

Rebecca Tortes



Youth & Culture

Donald Salcedo



Wildfire Relief & Climate Action

Rebecca Tortes



Food Sovereignty

Ella Kohler

WEBINAR SCHEDULE



01

Strategic Planning 101

➤ *September 17, 2025*

John Hendrix

02

Building Sustainable Funding

➤ *November 13, 2025*

Kimberly Miyazawa Frank

03

Project Management

➤ *January 2026*

04

**Community Engagement
& Outreach**

➤ *March 2026*

05

Avoiding Burnout

➤ *May 2026*

06

Grantee Stories

➤ *July 2026*

WHY THESE TOPICS?



“Based on responses to survey items that were not asked about in the TA portion of the survey, the following areas appear to be additional types of supports that would be useful for grantee partners:

- Strategic planning (60%)
- Support developing a communications manual (branding/style guide) (80%)
- Support developing a fiscal policy and procedures manual (45%)”



“Less than half of respondents reported having a strategic plan (40%, n=14) and two-thirds (n=10) of those with a strategic plan indicated they are currently updating their strategic plan or had done so in 2024”





Kimberly Miyazawa Frank

Kimberly Miyazawa Frank leads an organizational development strategy consultancy. Her 30+ years of experience have centered on driving transformational change by addressing policy and redesigning human capital systems to maximize individual and organizational performance. She has led practices in Diversity Equity Inclusion and Belonging (DEIB), Community Development, and Philanthropy.

A consultant to First Nations, Kimberly is the co-designer of its NextGen Program, a leadership development experience for young professionals. She also supports the organization through individual coaching, team building, and provides technical assistance for grantees. Kimberly holds a JD from Rutgers School of Law and a BS from Miami University. She was born and raised in Honolulu, Hawaii, and resides with her family in the Pacific Northwest.



LEARNING OBJECTIVES



Identify and understand the definition and common elements of Fund Development



Share a step-wise approach for assessing organizational readiness and developing an effective fund development plan



Review best practices and resources for execution and on-going support in fund development



FOR TODAY



- Please turn on your camera
- Prepare to engage and participate
- Type questions in the chat or un-mute and ask them
- Slides and resources will be made available

POLL



I know the difference between Fund Development & Fundraising

- A. True
- B. False



My organization:

- A. Has a Fund Development plan, and it is being implemented
- B. Does not have a Fund Development plan
- C. Has a Fund Development plan, but it is not being implemented



My organization's Fund Development efforts involve:

- A. Staff
- B. Board
- C. Community
- D. All stakeholders





Fund Development vs Fundraising

Fund Development is the strategic, long-term process of building and maintaining relationships with donors to secure the financial resources needed to deliver an organization's mission

Fundraising tends to be more transactional, shorter-term, and may not be part of a larger strategy



Elements of Fund Development

Fund Development includes the entire organization's efforts to cultivate support from 3 primary sources:

- Individual gifts
- Grants
- Special events

A Fund Development Plan documents the key elements needed to secure the financial resources to deliver on the organization's mission



The FD Plan Answers 4 Key Questions

➤ Who?

- Every person and part of the organization is reflected in the Plan

➤ When?

- The Plan is consistent with organizational needs and the external climate

➤ How?

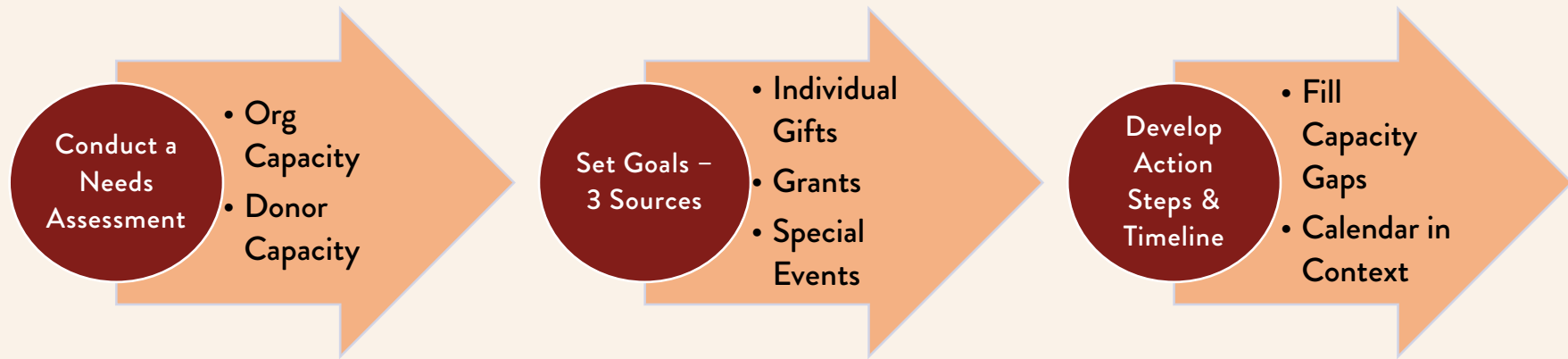
- Funds will come through a variety of sources all built on donor relationships

➤ Why?

- To deliver on the organization's mission



Developing a Fund Development Plan



Step 1 – Conduct a Needs Assessment

➤ Plan Alignment

- Fund development financial targets must align with the organization's operating budget, its program goals, and its strategic plan

➤ Organizational Capacity

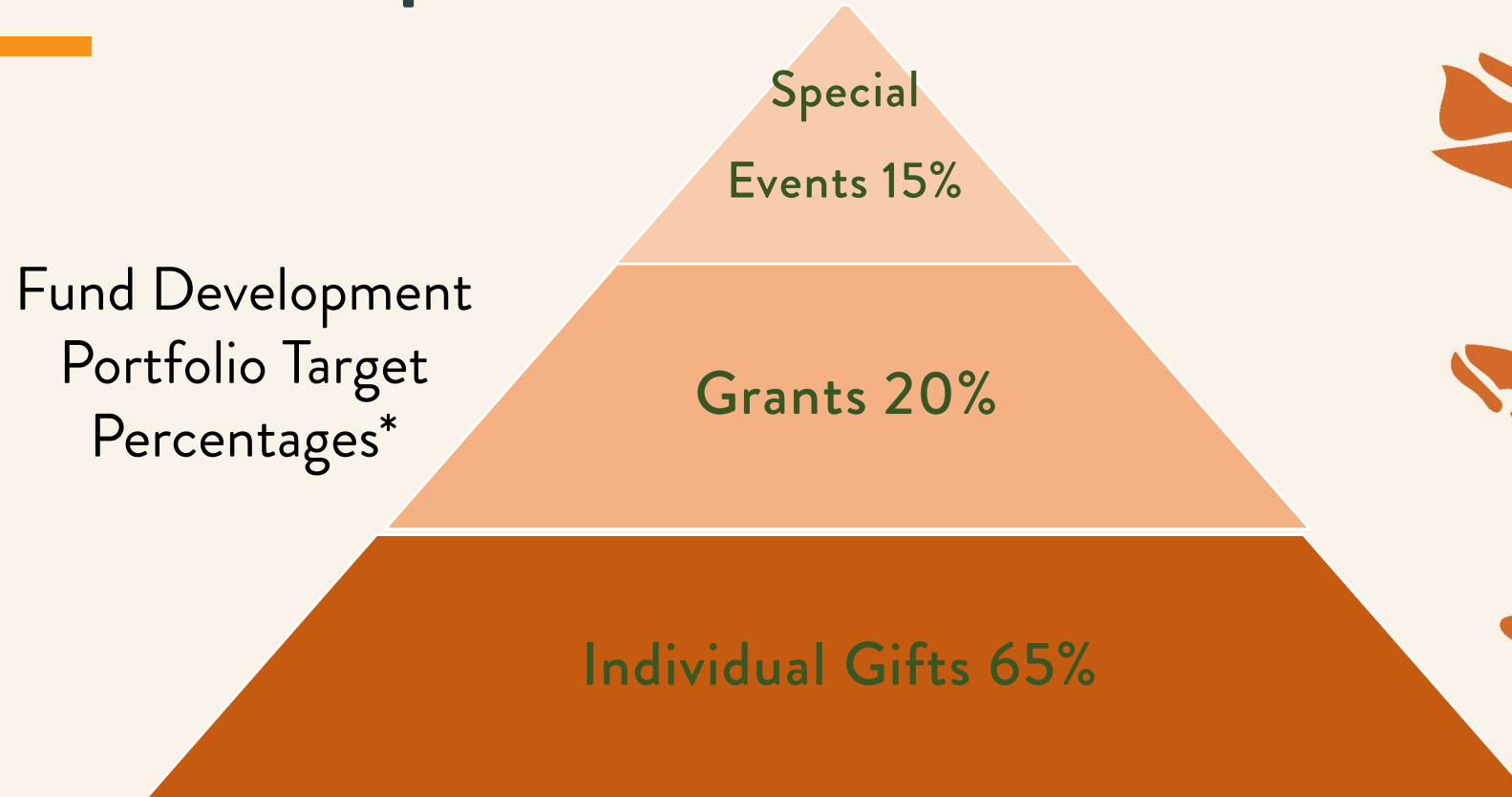
- Start where you are and build from there
- Identify the organizational lead for drafting the Fund Development Plan
- Identify Internal & External, Human & Organizational resources of support

➤ Donor Capacity

- “The best indicator for future giving is past giving”



Fund Development Plan Best Practices



Fund Development goals should align with the organization's strategic plan and goals

*Dependent on climate



Different Sources, Different Purposes

➤ Individual Gifts

- 6 "Rights" Goal: The right person, asks the right prospective donor, for the right gift, for the right program, at the right time, and in the right way
- 20% of donors give 80% of the dollars raised, but every gift matters
- Can be a one-time, annual, or planned (upon a triggering event) gift

➤ Grants

- Involve seeking specific funding opportunities and writing detailed proposals, requires alignment with mission and other grant parameters, can be one time or multi-year
- Sources include government, foundations, corporations or other organizations

➤ Special Events

- Multiple purposes: Raise funds AND raise awareness, cultivate new donors, steward current donors
- Primary challenge: Investment of time and costs may yield a low dollar ROI



Organizational Capacity

Expertise

- Staff & Board/Tribal Council
- Technology & Systems

Other Factors

- Staff responsibilities
- Staff & Board/Tribal Council relationships



Board/Council Fund Development Role

- Serve as ambassadors
 - Share their stories and connections to the organization
 - Leverage their credibility and inspire trust for the organization
- Engage their networks
 - Review donor lists and help steward donors
 - Open doors and make introductions for staff
- Serve as leaders and role models
 - Celebrate wins, thank and showcase donors
 - Goal = 100% of Board members are donors



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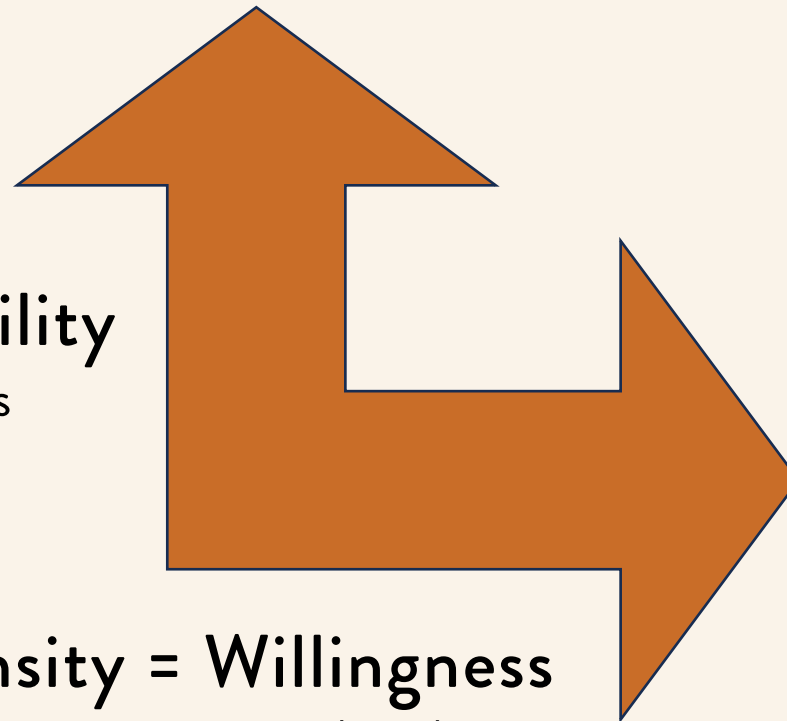
Donor Capacity & Propensity

Capacity = Ability

- Research/records
- Ask
- Timing

Propensity = Willingness

- Alignment to personal goals
- Relationship to org
- Resonance with mission/program



Wholistic Donor Development

- Embrace a holistic approach to philanthropy – The 5 Ts or ways donors support organizations:
 - Time
 - Talent
 - Ties
 - Testimony
 - Treasure
- Donors who give of the other 4 Ts are valuable and often subsequently make gifts of Treasure



Indigenous Philanthropy

➤ Ensure a culturally relevant approach – The 5 Rs of

Indigenous philanthropy:

- Respect
 - Reciprocity
 - Responsibility
 - Relationships
 - Redistribution
- Friend-raising is the first step to fundraising – host cultural activities & employ community-focused strategies



Donor Capacity & Propensity

- 4 key donor questions
 - What is the project/goal you are funding?
 - How much will that project/goal cost?
 - Who decided these are the priorities for the organization?
 - What do you want from me?
- The most important of these is: Who decided these priorities?
 - People support what they helped to create
 - Tie their support back to the strategic plan



Step 2 – Develop Goals by Source

Individual Giving (65% of Plan)

- Annual giving – each year, typically end of year timeframe
- Major gifts – over a certain dollar amount
- Planned gifts – as part of one’s will or trust, often upon death

Grants (20% of Plan)

- Source - Government, foundation, or corporate
- Type – Project, Operations, Capacity Building, Construction, Research

Special Events (15% of Plan)

- Examples – gala/dance, live or silent auction, 5K, craft & bake sale



Step 3 – Action Steps & Timeline

Quarter 1

Address gaps from Needs Assessment

- Shore up donor management system, Build fund development site
- Identify staff and/or engage fund development expert
- Conduct donor segmentation by capacity and propensity
- Review with the Board/Tribal Council

Quarters 2 & 3

Develop Strategy by Category

- Develop campaign theme, tagline, and communication materials for each type of giving
- Calendar types of giving, i.e., Special event in March, Individual giving in Oct – Nov, Grants – throughout the year
- Communicate with all stakeholders
- Review with the Board/Tribal Council

Quarter 4

Implement, Review, Refine & Repeat

- Go live
- Track and measure against goals
- Reassess resources and reset goals – establish a Fund Development annual cycle
- Review with the Board/Tribal Council



The Importance of Gratitude

Donor recognition is critical

- It's the right thing to do, AND
- It maximizes donor engagement, AND
- It boosts donor retention.

Recognition is most effective when it's

- Timely, AND
- Individualized, AND
- Highlights impact.

It need not be fancy or expensive (nor labor-intensive).

AND, it is never too late to say Thank You.



Review of Key Concepts

Fund Development

The strategic, long-term process of building and maintaining relationships with donors to secure the financial resources needed to deliver an organization's mission.

Fund Development Pyramid

The best practice percentages of the hierarchy of fund development sources: Individual gifts (65%), Grants (20%), Special Events (15%).

Donor Capacity & Propensity

The ability and willingness of a donor that is part of the readiness calculation.

Importance of Boards or Tribal Councils

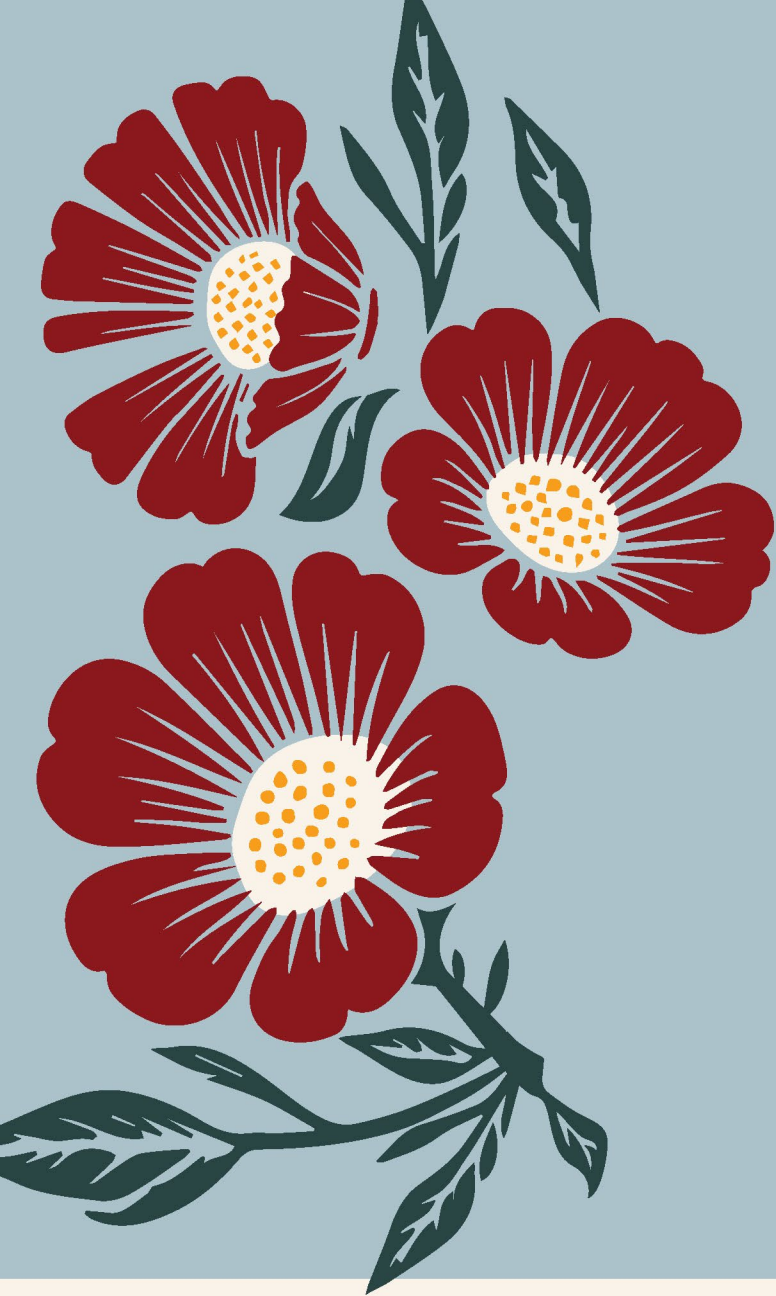
They are ambassadors, engage their networks, and serve as role models.

5 T's of Philanthropy

Donor support organizations with: Time, Talent, Ties, Testimony, Treasure.

Say Thank You

It's an important part of Fund Development



Question 1 - Discussion

In what areas does your organization need fund development support?



Question 2 - Discussion

What fund
development tips from
your organization can
you share?



RESOURCES

➤ All of us

- Please reach out to First Nations, to me, and to each other!

➤ Publications

- *Asking: A 59-Minute Guide To Everything Board Members, Volunteers, and Staff Must Know to Secure the Gift*, Jerold Panas
- *Achieving Excellence in Fundraising*, Eugene R. Tempel & Timothy L. Seiler
- *The Seven Faces of Philanthropy: A New Approach to Cultivating Major Donors*, Russ Alan Prince & Karen Maru File
- *Fundraising and the Next Generation; Tools for Engaging the Next Generation of Philanthropists*, Emily Davis
- *Chronicle of Philanthropy*: philanthropy.com

➤ Organizations

- Native Americans in Philanthropy: nativephilanthropy.org
- Association of Fundraising Professionals: afpglobal.org



QUESTIONS + ANSWERS



THANK YOU

We look forward to seeing you at our next webinar in January!



The recording of this webinar will be posted on First Nations' website under "Knowledge Center"



CONTACT

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