The Earned Revenue Toolkit

Insights, inspiration, & tools to support model sharers generate earned revenue

October 2024

www.northstaredpartners.com
www.transcendeducation.org

Use the tabs on the left to find the content that's most relevant to you

NorthStar EDUCATION PARTNERS

Transcend

Table of Contents

About Us

NorthStar Education Partners collaborates with schools, districts, and nonprofits to create lasting, equitable change in education. With a deep belief in the power of community and strategic clarity, NorthStar helps partners develop bold strategies and implement solutions that drive meaningful outcomes. Through customized consulting, strategic planning, and leadership development, NorthStar supports organizations in tackling challenges around educational equity, talent management, financial sustainability, and more. Over the years, NorthStar has partnered with over 200 organizations, empowering them to thrive and achieve sustainable impact. At its core, NorthStar envisions communities where all young people can learn, grow, and prosper, building a more just and inclusive future for all.

Learn more about NorthStar by visiting:
www.northstaredpartners.com

Transcend is a national nonprofit that supports school communities to create and spread extraordinary, equitable learning environments. The organization was founded on a belief that we must reimagine schooling, using a community-driven approach, so all children can realize their infinite potential. Transcend pursues its mission by partnering directly with schools on design journeys while also sharing powerful models, tools, and insights across the sector. To date, Transcend has worked directly with hundreds of schools and systems in over 30 states and has influenced thousands more. Ultimately, Transcend strives to fuel significant leaps in education so all young people can thrive in and transform the world.

Learn more about Transcend by visiting:
https://transcendeducation.org/

Acknowledgments

We want to recognize the deep commitment and expertise of all those who contributed to this resource. This resource synthesizes and builds on ideas from model sharers across the country, past partners, and countless others who are pursuing financial sustainability in bold and innovative ways.

We want to especially thank the following people who contributed to this resource.

Daniel Cordova & Daryl Peagler
NorthStar Team Members

Mark Conrad, Ryan Hall, and Alejandra Arrué Lou
Transcend Team Members

A special thank you to..

- Colleen Devery – NAF
- Geovanna Izurieta – Washington Latin Public Charter School
- Josh Thomases – IPSquared
- Kaycee Salmacia – Arizona State University Next Education Workforce
- Marvin Pierre – Eight Million Stories
- Sue Park – Yu Ming Charter School
- Stacey Wang – Yu Ming Charter School
- Yutaka Tamura – nXu

Each of these model sharers provided invaluable feedback on this toolkit

Help Us Continue to Improve This Resource.
We are always looking to learn, grow, and improve. If you have comments or suggestions for our next iteration, please share them with us here.

Intended Audience

This toolkit is designed for model sharers—schools and other entities dedicated to developing and sharing innovative models and resources to improve student outcomes. While crafted specifically with model sharers in mind, the tools, strategies, and insights provided here are relevant to all mission-driven organizations seeking to build a sustainable financial future.

Whether you're just beginning to explore revenue-generating offerings or have started experimenting and want to refine and expand your initiatives, this resource is structured to support your unique journey. Recognizing that organizations are at various stages in their path to financial sustainability, this toolkit provides actionable guidance to help you leverage your strengths and align your financial practices with your mission and goals.

Choose Your Learning Path: Entry Points into the Toolkit

We recognize that model sharers approach this content with varying levels of experience and expertise. To make the most of this resource, we suggest several possible entry points into this resource.

If You Are Not Sure Where To Start

Take the 5-Minute Diagnostic to receive a personalized assessment and tailored content.

If You Are New to Earned Revenue and Need a Primer

Start with **Section 1: Financial Foundations** for an overview.

Take the **5-Minute Diagnostic** to receive a personalized assessment and tailored content.

Explore the **financial modeling and growth tool**

Watch the **recorded webinar** for an overview of key concepts from this toolkit.

If You Are Experienced with Earned Revenue & Seeking New Ideas

Explore **Section 2** to discover new strategies for expanding and diversifying your revenue streams.

Use **Section 3** to find a tool or resource that will help you take your earned revenue strategy to the next level.

Explore Transcend's Models Exchange for inspiring learning models and supports.

If You Are An Earned Revenue Expert

Reach out to **us**—we'd love to learn from you and support you in more customized ways.

Overview

Transcend and NorthStar support a community of education organizations that have innovative ideas and solutions to share, and one of the most common challenges we hear about is financial sustainability. In August 2024, Transcend surveyed its model-sharing community to identify the financial sustainability topics they most wanted to explore. The top choice? Making the shift to mission-aligned investment in earned revenue.

While many model sharers are in the early stages of exploring or expanding their revenue strategies, they often encounter significant barriers. This toolkit is designed to address these barriers by offering practical strategies and customizable tools to help model sharers build a sustainable financial foundation through thoughtful, mission-aligned earned revenue strategies.

Key Steps for Generating Earned Revenue

Cultivate the Right Mindset and Build Financial Literacy
Conversations about revenue can be uncomfortable, especially when personal or cultural discomfort with money intersects with limited financial literacy. Foster a culture where financial sustainability is seen as essential to fueling your mission, and equip staff to engage confidently in financial decisions.

Design Impactful, Value-Generating Offerings
Earned revenue strategies will fail if your offerings don't meet real, unmet community needs. Focus on developing solutions that align with your mission and deliver high impact before monetizing them.

Assess Fit and Readiness
Ensure that earned revenue aligns with your mission and financial strategy, and confirm that your organization has the capacity and systems needed to pursue it effectively.

Select the Right Revenue Pathways and Build Demand
Explore revenue pathways—such as partnerships, licensing, joint ventures, or coaching—that align with your strengths and mission. Build demand by developing proof points that clearly showcase your impact and create urgency for adoption.

Know Your Numbers and Price for Sustainability and Equity
Track the full costs of each offering and use these insights to guide pricing. Develop a model that balances sustainability with access through tiered pricing or sliding scales, ensuring affordability without compromising financial health. Continuously evaluate and adjust offerings and pricing in response to the needs of your community, organization, and market dynamics.

SECTION 1

Financial Sustainability Primer

This section serves as a **primer for model sharers who are new to financial sustainability concepts and earned revenue strategies.** It introduces key definitions and explores what financial sustainability looks like for mission-driven organizations. We'll also highlight the **organizational shifts that successful model sharers are making**—culturally, operationally, and financially—to build sustainable practices.

SECTION 1

Financial Sustainability Primer

1. What is financial sustainability?

Financial sustainability is the ability to consistently generate revenue that fully covers expenses, builds reserves, and supports growth—all while staying aligned with the organization's mission and values. It is not just about having enough funding to keep operations running; it's about having a strategic, mission-driven approach to securing and managing resources that ensures long-term impact and resilience.

While model sharers can pursue multiple paths to sustainability—whether through a diverse mix of revenue streams or by focusing deeply on 1-2 sources such as public funding and major donors—there are common indicators that can guide you along the way. These indicators serve as signposts to help assess whether your organization is on the path toward financial sustainability.

What it *is*

- The ability to consistently generate revenue that covers expenses, builds reserves, and fuels impact—*all while staying true to your mission and values*
- A strategic approach to managing resources that ensures long-term impact and resilience.

What it *isn't*

- Surviving or covering the basics
- Relying solely on unpredictable grants, squeezing programs to cut costs, or compromising your mission for funding

Financial sustainability is about building intentional, adaptable revenue streams that allow your organization to thrive.

CHECKLIST

Are You on the Path to Financial Sustainability?

- [ ] **Self-Determination**
Your organization has the autonomy to make financial decisions that align with your mission and strategy. This freedom allows you to stay true to your values and prioritize the initiatives that best serve your goals.

- [ ] **Strategic Revenue**
You have developed sustainable and strategic revenue streams (e.g., earned revenue, grants, donations, public funding, partnerships). This may be prioritizing 1-2 revenue streams such as public funding and large grants, or a broader mix of funding streams that includes funding streams such as partnerships, licensing, and other forms of earned revenue.

- [ ] **Impact Funding**
Your financial resources are sufficient not only to maintain your current offerings but also to invest in continuous improvement, research and development (R&D), and strategic growth when appropriate. Your funding fuels long-term impact in your communities and allows you to ensure equitable access to your offerings.

- [ ] **Risk Management & Resilience**
Your organization proactively plans for risks by safeguarding against shifts in public and philanthropic funding. This includes contingency planning and risk mitigation strategies to ensure you can continue operations even during disruptions.

- [ ] **Equitable Pricing & Accessibility**
Your pricing strategy is mission-aligned and ensures that costs are not a barrier to those who most need access to your offerings. You strike a thoughtful balance between covering costs, aligning with market rates, and providing equitable access through tiered or sliding-scale pricing models.

- [ ] **Building Reserves**
You consistently set aside funds to build financial reserves that provide stability during economic shifts, cover unexpected challenges, or support future opportunities. These reserves allow your organization to operate with confidence, even in uncertain times.

- [ ] **Systems and Culture**
You have developed the necessary systems and financial practices to regularly evaluate your financial position and respond to changes in the communities you serve and / or the broader market.

2. What are the key steps to generating earned revenue?

Key Steps	Action Items
Cultivate the Right Mindset and Build Transparency Around Finances Conversations about revenue can be uncomfortable, especially when personal or cultural discomfort with money intersects with a lack of open financial dialogue. Foster a culture where financial sustainability is seen as essential to fueling your mission, where staff understands financial conditions, has access to relevant data, and builds skills to incorporate finances into programming and budget decisions.	1. Facilitate discussions on staff cultural and historical views around money and align on organizational values for earned revenue, with an emphasis on equity and access. 2. Read the **case studies** to study different pathways to financial sustainability. 3. Craft your **financial sustainability vision statement** with your team. 4. Incorporate financial sustainability into conversations about **designing and delivering your offering.**
Design Impactful, Value-Generating Offerings Conversations about revenue can be uncomfortable, especially when personal or cultural discomfort with money intersects with a lack of open financial dialogue. Foster a culture where financial sustainability is seen as essential to fueling your mission, where staff understands financial conditions, has access to relevant data, and builds skills to incorporate finances into programming and budget decisions.	1. **Listen closely to the communities you serve** to align offerings with their needs. 2. Use the **Offering Model Whiteboard Template** to develop your offering vision and ensure it is designed with financial sustainability in mind. 3. **Pilot offerings through small projects** and evaluate impact—informally or formally—before scaling.
Determine Which Offerings to Start, Stop, or Scale Assess which offerings to start, stop, or scale based on their alignment with your mission and financial sustainability vision.	Plot all current offerings on **Bridgespan's 2x2 matrix** to evaluate the impact and earned revenue. Use these tools to guide the next steps: **Read the article**

Evaluate both impact and revenue potential to guide decisions.

📝 **Download the guide** and **Excel template**
📽️ **Watch an introductory video**

Use the **Readiness Criteria Rubric** to align your team on readiness to launch offerings.

Build staff capacity to **market, communicate, deliver, and evaluate offerings** effectively.

3.

Select the Right Revenue Pathways and Build Demand

Explore revenue pathways—such as partnerships, licensing, joint ventures, or coaching—that align with your offerings, mission, and financial sustainability vision. Build demand by showcasing your impact and reaching your audience through targeted strategies.

Explore Earned Revenue Strategies to identify creative ways to monetize existing offerings in alignment with your mission.

Use the Offering Model Whiteboard Template to develop your offering vision and ensure it is designed with financial sustainability in mind.

Create demand by:

- Developing proof points of impact (e.g., case studies, testimonials)
- Tuning marketing strategies to show how your offering solves key problems
- Publishing webinars, white papers, and op-eds to raise awareness
- Expanding channels through email, social media, referrals, and partnerships

Know Your Numbers and Price for Sustainability and Equity

Track the full costs of each offering and use these insights to guide pricing decisions. Develop a pricing model that balances **financial sustainability with equitable access** through tiered pricing or sliding scales. Continuously evaluate and adjust offerings and pricing based on the needs of your community and market conditions.

1. **Use the Financial Model Spreadsheet** to project expenses, revenue, and growth and ensure you are on track to achieve your financial sustainability vision.
2. Implement **tiered pricing or sliding scale models** to ensure accessibility while maintaining financial health.
3. Regularly **review and adjust pricing** based on community needs, client feedback, and market dynamics.

What are common hurdles faced by model sharers when they pursue earned revenue?

Pursuing earned revenue can be a key strategy for financial sustainability, but it's not without its challenges. Here are some of the primary hurdles that model sharers often encounter, along with what it might sound like from staff experiencing the hurdle.

Shifting Mindset and Culture

One major hurdle is the organization's mindset around money. Discussions about fundraising or earned revenue can feel uncomfortable, particularly if team members carry personal or cultural histories related to money. Shifting the narrative from "asking for money" to "inviting others to invest in a shared vision" is a crucial cultural shift that takes time and intention to cultivate across your team.

"There's a deep emotional weight for folks of color around money—it's not just financial, it's personal. We hold the tension of carrying this history and trauma around wealth disparities, which can make it hard to step into fundraising and connect with those holding the resources. And then there's the added tension of charging for support that feels like it should be free; it feels like putting a price tag on something meant to be shared. Balancing that is really difficult."

— Early-stage model sharer

"We rushed to start selling our services because we thought it would bring in revenue quickly, but we hadn't really nailed down the core offering yet. It wasn't fully codified or tested for impact, and we ended up spreading ourselves thin—chasing revenue without a clear plan. It created more distractions and stress than it was worth."

— Early-stage model sharer

Creating Impactful, Value-Generating Services

Financial sustainability hinges on delivering high-impact offerings that truly meet the needs of the communities served. However, moving too quickly to monetize services before fully codifying them can create stress, distractions, and ultimately lead to a lack of demand. It's essential to focus on understanding stakeholder needs and refining your offerings to ensure they drive value.

Raising Awareness and Generating Demand

"We have this incredible model that's been proven to work, but getting schools

Even with impactful and well-designed offerings, some model sharers struggle to gain traction in the marketplace. A strong value proposition is necessary to break through the status quo, especially in the education sector, where stakeholders often lean toward familiar practices. The challenge is not only proving impact but also communicating value and creating urgency for adoption.

to see the value and scale it has been an uphill battle. It's frustrating because we know the impact it can have, but the field either doesn't understand it or simply doesn't know it exists. It's hard to grow when there's no real demand."

— Program director of a scaling model sharer

"We customize everything to meet our schools' needs, but that makes our offerings wildly inefficient. When we calculate the true costs—time, travel, one-off planning meetings—we're actually losing 2x-3x of the revenue we bring in. That was fine when we were in startup mode, but it's just not sustainable anymore given the shifts we're seeing in philanthropy."

— COO of a growing model sharer

Aligning Mission, Program, and Finance

A lack of alignment between mission, programmatic goals, and financial strategy can lead to inefficiencies. Sometimes, model sharers customize every offering to meet the specific needs of each school or partner, without a clear understanding of the associated costs. This can result in offerings operating at a financial loss—sustainable in a startup phase but challenging as the organization matures and faces shifts in philanthropy.

Building Closed-Loop Financial Data Systems

Many model sharers lack robust financial systems that clearly capture the costs of programs, link revenue to growth, and provide actionable data for decision-making. When financial data isn't integrated, it becomes difficult to understand the impact of each hire, investment, and offering on overall sustainability. Developing closed-loop systems—where data is used to inform action—is essential for strategic financial planning.

"Going through financial sustainability training and seeing a fully developed financial model that captured all the costs and revenue for each program was eye-opening. It helped me see the impact of every new hire and every hour we put into each offering, and rethink decisions about in-person versus hybrid. All of this was opaque before, and honestly, I didn't even consider it when designing."

– Program leader of an established model sharer

4. What is earned revenue?

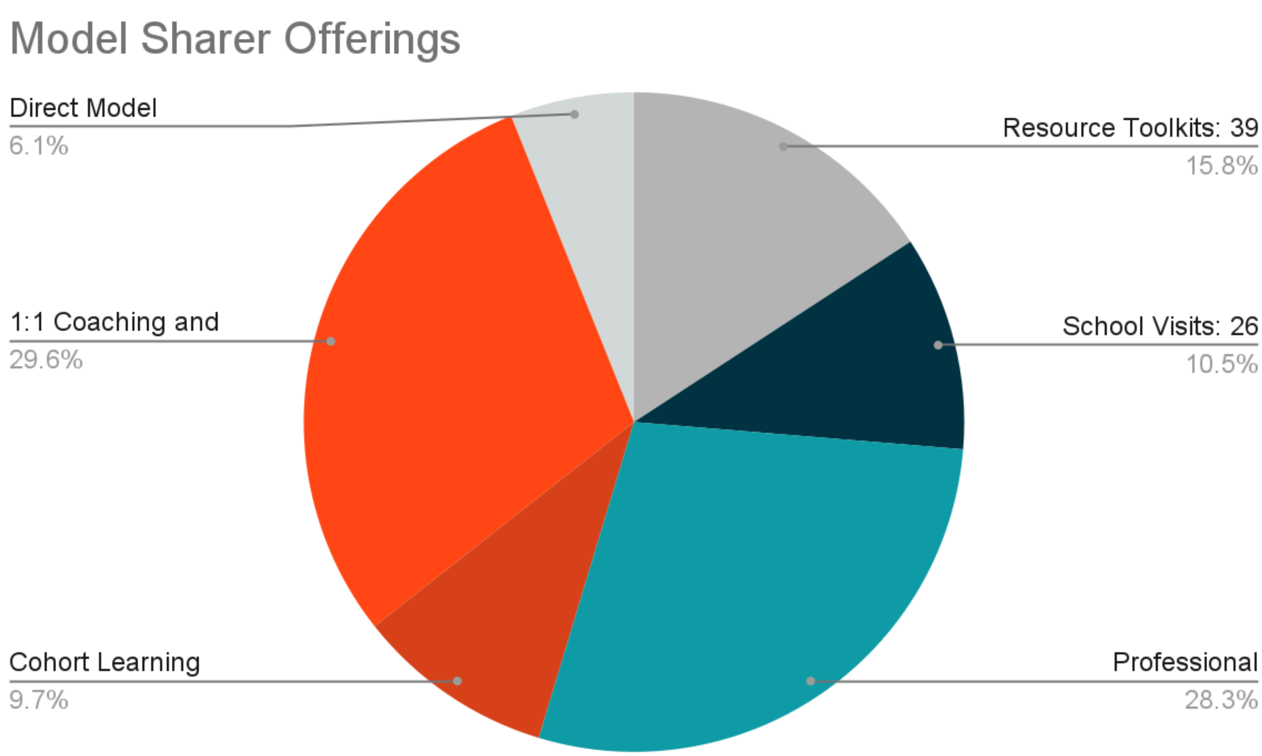
For many model sharers, achieving financial sustainability hinges on finding stable and predictable revenue streams. Earned revenue offers a pathway to building a steady financial foundation that's closely aligned with your core mission and services, providing a consistent source of income that can support long-term growth and impact.

What is Earned Revenue?

Earned revenue is income generated from offering services or products directly connected to your mission. Unlike grants or donations, which often come with conditions and fluctuate based on funder priorities, earned revenue is grounded in the core work of your organization. This makes it a steady and mission-driven source of income. While earned revenue can be unpredictable initially, as you test offerings and build demand, it has the potential to become a more reliable funding source over time, allowing you to achieve greater self-determination and financial sustainability as your model matures.

Earned Revenue in Action

The diversity of earned revenue opportunities is reflected in the services offered by model sharers on Transcend's Innovative Models Exchange. The breakdown below shows how model sharers are generating revenue through a variety of offerings:



Some model sharers focus on professional development and coaching, while others build learning communities or provide direct support to schools. The goal is to find offerings that align with your strengths, create value for your stakeholders, and build a steady source of revenue to sustain your work. There are a wide range of avenues to generate revenue, which we cover in detail in Section 2.

5. Why Pursue Earned revenue?

Thoughtfully developed, mission-aligned earned revenue provides several significant benefits:

Safeguards Against Leadership Changes
When revenue is tied to the services you provide rather than to relationships with funders or an iconic leader, your organization is better equipped to navigate leadership transitions without major financial disruption. Revenue rooted in core offerings helps maintain stability even amidst internal change.

Lowers Risk Through Diversification
With earned revenue as part of your financial strategy, your model sharer is less vulnerable to shifts in funder priorities, whether from foundations, government agencies, or donors. This mix of income streams enhances financial stability and reduces risk.

Supports Self-Determination
Earned revenue typically has fewer restrictions, deadlines, or conditions compared to grant or public funding. This allows model sharers to make decisions that align fully with your mission, strategy, and priorities without being beholden to funders' values or geographic limitations.

Offers Increased Predictability Over Time
While earned revenue might fluctuate in the early stages, it has the potential to become a more predictable source of funding over time. As your offerings gain traction and your relationships with stakeholders deepen, earned revenue can form a steady financial base, reducing reliance on uncertain funding streams.

Incorporating earned revenue into your financial strategy provides a pathway to build a steady, mission-aligned funding base that sustains your model sharer for the long term. By generating income linked directly to your core offerings and values, you can establish a predictable and adaptable financial foundation. Whether through professional development, consulting, resource toolkits, or other services, earned revenue can serve as a cornerstone of your financial sustainability journey, empowering you to pursue your mission with greater self-determination and impact over time.

6. What does financial sustainability typically look like across a Model Sharer's Lifecycle?

A model sharer's journey toward financial sustainability evolves over time, shaped by the organization's growth stage and the changing landscape of revenue opportunities. It's important to understand that multiple factors impact a model sharer's financial sustainability strategy, including where they are in their lifecycle. While mature, well-established model sharers may have diverse earned revenue and partnership strategies in play, early-stage model sharers often need to rely more heavily on philanthropic funding to fuel design and development efforts.

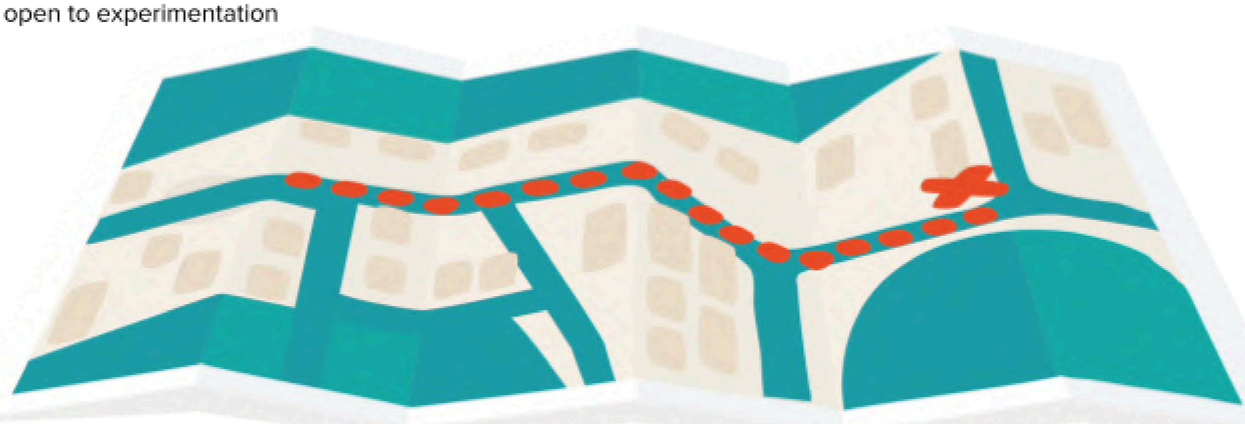
The journey toward financial sustainability varies for each model sharer. While these stages provide a rough timeline, the actual path and timing may differ based on an organization's unique context and opportunities.

1

Early-Stage Model Sharers (Years 0–2)
At this point, many model sharers are bootstrapping their ventures, developing a proof of concept, and leveraging any available resources. This may include volunteer hours, support from other programs, and flexible or opportunistic revenue streams. Financial sustainability at this stage is typically about adaptability, finding creative funding solutions, and staying open to experimentation

2

Design and Testing Stage (Years 3-4)
When model sharers are ready to refine their ideas and test their offerings, initial design and development are often funded through philanthropy and grants. The focus at this stage is on piloting, learning quickly, and starting to build demand—all while ensuring offerings remain aligned with the mission and are responsive to community needs.



3

Mid-Stage Growth (Years 5–7)
As the model gains traction and demonstrates its value, many model sharers start exploring earned revenue strategies. This might involve charging for services or layering in new revenue sources that align with their mission. During this stage, it's about building the capacity for revenue generation, experimenting with new streams that can offset costs, and gradually reducing reliance on grant funding.

4

Late-Stage Maturity (Years 8+)
Mature model sharers may develop a long-term vision for financial sustainability that includes multiple pathways. This can include deep investment in one or two revenue sources such as public funding and major corporate partnerships or the addition of robust earned revenue streams. At this stage, the focus is on balancing deep and sustainable funding sources to sustain the organization's growth and impact.

7. Introducing the 11 Financial Sustainability Shifts

Through our work with model sharers, we've identified 11 key shifts that high-impact organizations make to build sustainable financial models. These shifts represent the cultural, operational, and practical changes that help organizations align their mission, financial strategies, and day-to-day practices. Whether you are new to earned revenue or seeking to refine your approach, these shifts can provide a roadmap for embedding financial sustainability throughout your organization.

These 11 shifts are organized into two categories: Foundational Shifts and Strategic Financial Shifts. Foundational shifts ensure your organization is prepared to align its mission, programs, and culture with financial sustainability. Strategic shifts focus on revenue generation, financial systems, and growth strategies that sustain your work over the long term.

Section 1: Financial and Organizational Foundations

Shifts to consider before embarking on deeper financial sustainability initiatives

From	To
Misalignment on core strategy Team members are unclear or mis-aligned on the organization's purpose, beliefs, and strategy, leading to fragmented efforts and reduced impact.	**Alignment on core strategy** Team members are deeply anchored in the organization's fundamental purpose and intended impact of model sharing, with a clear, shared strategy and concrete goals that drive all actions.
Disconnected from the end-user experience Team members have minimal ongoing engagement with the communities served, resulting in offerings that may not fully meet their needs or adapt to changing circumstances	**Deep connection to the end-user experience** Team members actively engage with the communities served to understand their experiences, unmet needs, and changing contexts, ensuring relevant and impactful offerings.

From

Low relevance & market fit
Offerings experience low or declining adoption rates due to a poor fit with or misunderstanding of the market and end-user needs, inability to encourage the field to move beyond industrial-era methods, or other factors

To

High relevance & market fit
Offerings are highly relevant to buyers and target communities and beyond, fueled by a strong alignment with community needs and the ability to inspire the adoption of more innovative approaches.

From

Limited evidence of impact & satisfaction
Offerings fail to achieve desired outcomes or reach high levels of stakeholder satisfaction or poor systems in place to collect data or measure impact.

To

Strong evidence of impact & satisfaction
Offerings show promising evidence of strong impact, results, and high stakeholder satisfaction, commensurate with the organization's stage of growth.

PAUSE & REFLECT: To what extent have we made the shifts above? Where have we made the most progress, and where do we still have the most room to grow? What additional investments, pilots, or resources can we allocate to fulfill these shifts more concretely?

Section 2: Financial Sustainability Shifts

Additional shifts to consider as organizations continue their financial sustainability journey

From

Limited understanding of financial drivers
Financial drivers are not fully understood, with little clarity on key revenue sources, major expenses, and financial health. There is a lack of established financial metrics, leading to uninformed and reactive financial decisions.

To

Strategic implementation of desired financial drivers
Financial drivers are well understood, with established and regularly utilized financial metrics that provide clear insights into key revenue sources, major expenses, and financial health. Financial metrics guide informed and strategic financial decision-making across the organization.

From

Limited investment in earned revenue
Earned revenue opportunities are underexplored, leading to an over-reliance on philanthropic revenue. The pricing strategy is underdeveloped and misaligned with market value, equity commitments, and organizational goals.

To

Mission-aligned investment in earned revenue
A strategic, mission-aligned approach to earned revenue is established or in development, supporting financial sustainability. A clear pricing strategy is in place that aligns with market value, equity commitments, and organizational goals.

From

Reactive fundraising
Fundraising efforts are ad hoc and reactionary, lacking a coherent strategy aligned with long-term financial sustainability goals.

To

Strategic fundraising
Strategic fundraising efforts are in place or in development that are proactive, build long-term relationships with donors, and are aligned with the organization's mission and financial sustainability goals.

From

Reactive growth
New client relationships develop idiosyncratically and/or through word-of-mouth with limited strategy, focused marketing or cultivation processes.

To

Strategic growth
Longer-term growth and cultivation goals are set, implemented and evaluated, often considering geographic and other intentional growth opportunities.

From

Inefficient offerings management
Expenses are excessively high due to a lack of visibility into costs, inefficiencies in designing and delivering offerings, high overhead, and other contributing factors, leading to unsustainable financial costs and reduced overall financial sustainability.

To

Efficient and well-managed offerings
Expenses are aligned with organizational goals, closely monitored, and managed through regular process improvements, thorough cost analysis, and benchmarking to drive efficiencies and reduce overhead, supporting overall financial sustainability.

From

Outdated financial systems
Financial tools are outdated and inefficient, resulting in disorganized or hard-to-analyze financial data that obscures visibility into the organization's operations and financial performance. Consistent processes for reviewing and utilizing financial data are lacking.

To

Modern and efficient financial systems
A comprehensive set of modern financial tools (accounting, payroll, sales flow, etc.) and reporting systems provide clear, actionable insights into expenses, revenue, and overall financial health. Consistent organizational processes are in place to effectively utilize financial data for surfacing insights and driving decision-making.

From	To
Emerging financial sustainability culture and capacity Staff and leadership have a limited understanding of financial sustainability principles and rarely prioritize sustainability, leading to inconsistent financial decision-making.	**Strong financial sustainability culture and capacity** Staff and leadership cultivate a culture of financial awareness and sustainability, with ongoing education and transparent sharing of financial information, supporting long-term financial sustainability.

Why These Shifts Matter

These shifts are interconnected, with each one reinforcing your organization's ability to build and sustain mission-aligned financial practices. For example, anchoring in core strategy helps ensure that earned revenue efforts align with your mission, while modern financial systems provide the data needed to make informed decisions about program design and pricing.

By intentionally pursuing these shifts, model sharers can build sustainable revenue streams, create operational efficiencies, and embed financial sustainability into their organizational culture. This section will guide you through the first steps of making these changes, laying the foundation for deeper, mission-aligned financial practices in the sections that follow.

Explore Earned Revenue Pathways

Model sharers pursue unique visions for financial sustainability, often taking creative—and sometimes tough—steps to get there. From cutting ineffective programs to shifting from custom services to streamlined, scalable offerings, each journey reflects hard-earned lessons.

The case studies below, inspired by real model sharer experiences, offer insights and inspiration. Dive in to see how different organizations made bold pivots, optimized services, and built new revenue streams in pursuit of their sustainability goals.

Why Pursue Earned Revenue?

Scale through Streamlining

Key Actions

- Streamlined services by codifying training materials and toolkits to reduce delivery time
- Lowered delivery costs by shifting to virtual formats
- Developed templates and standardized offerings to increase scalability
- Paused cohort programs focused on curriculum implementation with academic leaders in urban districts due to variable impact and declining enrollment/referrals
- Partnered with national organizations to grow and scale their reach

Earned Revenue Journey
National Instruction & Curriculum Implementation Support Organization

Founded
2018

Financial Sustainability Vision
By 2030, 70% of our organization's expenses will be covered by sustained earned revenue, giving us the freedom to pursue initiatives that best serve our communities. The remaining 30% will come from multi-year grants for R&D and piloting new offerings.

YEAR 1 (2018)	Launched **pilot programs** focusing on **curriculum implementation** with academic leaders in three urban districts, funded by **$500K in grants**. Published a **white paper** to build awareness and position the organization in the field.
YEAR 2 (2019)	Introduced **leadership cohorts** at $2,500 per participant but faced **declining enrollment and variable impact**. Offered **30% discounts** and **free consultations** to attract partners but saw limited results.
YEAR 3 (2020)	Paused the cohort model after conducting an **audit of design and delivery time.** Found that **staff time and expenses exceeded revenue by 60%**, resulting in **operating the program at a loss**. This led the organization to **streamline services** by codifying key trainings and templates to reduce delivery time and effort.
YEAR 4 (2021)	Shifted services to **virtual delivery**, reducing travel costs. Developed **standardized templates and toolkits** to ensure faster and more consistent delivery. These efforts led to a **25% profit margin across all programming.**
YEAR 5 (2022)	Partnered with a **national superintendent's association**, resulting in **doubling the number of districts served** and **expanding into new geographies**. Professional development (PD) was offered at **$8,500 per session**, and by year-end, **earned revenue covered 50% of expenses.**

Strategic Pivots

Key Actions

- Discontinued low-demand services to focus on higher-impact offerings
- Redesigned core consulting model to emphasize value and impact
- Shifted pricing structure based on market insights and feedback
- Introduced licensed tools, surveys, and a benchmarking platform to generate scalable revenue
- Used webinars and free consulting sessions to engage potential clients and build visibility

Earned Revenue Journey

Regional Student Well-Being and SEL Consulting Organization

Founded

2020

Financial Sustainability Vision

By 2028, our financial model will achieve a 50/50 split between earned revenue and philanthropic support. Corporate and foundation grants will fund R&D and innovation, while consulting, coaching, and digital tools sustain core operations.

YEAR 1 (2020)	Piloted **SEL programs** in five schools with a **$300K grant**. Published a **landscape scan paper** summarizing **key trends in SEL** and identifying **gaps in curriculum and implementation** to raise awareness of the **impact and need for SEL.**
YEAR 2 (2021)	Launched **SEL workshops at $3,000 per session** and **coaching at $150/hour.** Introduced **free webinars** and **30-minute consulting sessions** to attract potential partners.
YEAR 3 (2022)	Shifted to **licensed SEL content** that included **curriculum, walk-through observation tools, and project-based SEL tasks aligned to Common Core standards. Discontinued low-demand coaching packages** to focus on more scalable offerings. Launched a **web-based platform** that allowed districts to **benchmark their SEL survey results against national results**, expanding the value proposition.
YEAR 4 (2023)	Hired **seasoned SEL coaches** capable of delivering services at **$250/hour,** significantly increasing the value of consulting engagements. Streamlined workshops and consulting services to align with the most requested offerings.
YEAR 5 (2024)	Used **webinar data** to identify high-interest partners and convert them into paying clients. Participated in **conferences and events** to build visibility. By year-end, **earned revenue covered 50% of expenses,** providing stability for future innovation.

Strategic Pricing

Key Actions

- Developed a sliding-scale pricing model to attract under-resourced schools
- Surveyed stakeholders to assess impact and willingness to pay
- Shifted focus to higher-value school partnerships for more predictable revenue
- Increased pricing for high-demand services based on demand analysis
- Targeted small charter networks and rural high schools to expand access
- Used CRM tracking to build deeper relationships and transition partners to higher-tier offerings

Earned Revenue Journey

College Access & Career Pathways Nonprofit Serving Communities

Founded

2017

Financial Sustainability Vision

By 2027, 60% of our operating costs will be funded through earned revenue from coaching, workshops, and school partnerships. The remaining 40% will come from public funding and individual donations to ensure equitable access for students.

YEAR 1 (2017)	Launched **free college workshops** with $400K in grants. Partnered with **local businesses** to host events, but struggled to convert participants into paying clients.
YEAR 2 (2018)	Introduced **career coaching at $100/hour**, but demand was low. Conducted a **survey of stakeholders** to gauge the value of services and **assess willingness to pay**. Based on feedback, **shifted focus to school partnerships** at $7,500/year for more consistent revenue.
YEAR 3 (2019)	Launched a **membership model** offering unlimited workshops and coaching at $25K/year but failed to attract enough partners. Used survey insights to **adjust the pricing model** and **refine service offerings.**
YEAR 4 (2020)	Developed a **sliding-scale pricing model** targeting under-resourced schools. **Focused outreach on small charter networks and single-site high schools in rural areas** that could not afford traditional college access programming. Earned revenue **covered 20% of expenses.**
YEAR 5 (2021)	**Increased rates** for high-demand services and **used CRM tracking** to deepen relationships, moving existing partners into **higher-tier offerings.**

SECTION 2

Earned Revenue Strategies

This section outlines a variety of earned revenue strategies that model sharers are currently using to generate sustainable income. Our goal is to spark new ideas and inspire creative approaches for your own earned revenue journey. Each strategy offers unique opportunities and challenges, and the key is

finding the right fit for your organization’s mission, strengths, and community needs

What are strategies for generating earned revenue?

This section explores four major categories of earned revenue strategies, each leveraging different organizational assets, capabilities, and audiences. These strategies illustrate the various ways model sharers can align revenue generation with their mission and strengths. While some model sharers focus on monetizing their expertise, others capitalize on physical resources, community engagement, or product offerings. Finding the right mix of strategies is key to building a sustainable and mission-aligned financial model.

Service Revenue

This category focuses on monetizing the model sharer's specialized knowledge, intellectual property, or thought leadership. These strategies rely on the unique expertise that model sharers bring to the field and can be delivered through a variety of formats, both in-person and virtual.

Earned revenue strategies in this category include:

- 1:1 Coaching and Consulting: Offering customized support for leaders or teams.
- Professional Development: Providing training sessions for educators or administrators, either on-site or virtually.
- Accreditation & Certification Programs: Creating certification pathways that align with best practices in the field.
- Licensing Content/Curriculum: Allowing other organizations to use your intellectual property to implement or adapt your model.

Product Revenue

This category involves monetizing physical or digital products that add value to your audience. Often, these strategies leverage your existing content, curriculum, or tools, packaged into easily accessible offerings.

Earned revenue strategies in this category include:

- Online Courses/Workshops (Self-Paced): Creating digital courses that participants can complete on their own schedule.
- Downloadable Tools & Resources: Offering templates, toolkits, or resources that can be purchased or accessed for a fee.
- Product Sales (Physical or Digital): Selling books, workbooks, or branded merchandise related to your work.
- Technology Platforms or Apps: Developing apps or platforms that extend your impact and generate recurring revenue.

Physical Resources & Infrastructure Revenue

This category leverages the physical assets, spaces, or operational expertise of the model sharer. These strategies may involve generating revenue directly from your facility or providing consulting services to help others replicate your model.

Earned revenue strategies in this category include:

- Direct Model Implementation: Operating schools, programs, or services directly within a community.
- Facilities Rentals & Venue Services: Renting out spaces or venues for external events or gatherings.
- Research & Development (R&D) as a Service: Offering research capacity to other organizations as a paid service.
- Equipment Leasing & Technical Support: Providing specialized equipment or technology along with expert support.
- Facility & Model Implementation Consulting: Advising other organizations on how to design and run similar facilities or programs.

Audience Revenue

This category leverages the value of the model sharer's audience and community engagement to generate revenue. Strategies in this area focus on building partnerships and engaging with the community to drive collective projects or secure sponsorships.

Earned revenue strategies in this category include:

- Sponsored Content/Advertising: Partnering with organizations to advertise or promote products aligned with your mission.
- Affiliate Marketing: Earning commissions by promoting services or products relevant to your audience.
- Memberships: Creating membership programs that offer exclusive benefits to supporters.
- Cause-Related Marketing Partnerships: Collaborating with companies on campaigns that drive awareness and donations.
- Crowdsourced Content or Community Contributions: Engaging your audience to co-create resources or raise funds for shared initiatives.

Which earned revenue strategy is right for You?

Selecting the right earned revenue strategy requires careful reflection. Not every strategy will fit every model sharer, and what works at one stage of your journey may not work at another. Use the following criteria to assess whether a strategy aligns with your organization's goals, capacity, and mission:

Mission Alignment:
Does this strategy align with your core mission and values, or could it create mission drift?

Community Fit:
Does the strategy address a specific need within your community? Will it provide real value to your audience?

Capacity & Expertise:
Do you have the internal skills, staff, and systems needed to execute the strategy effectively?

Financial Viability:
Can the revenue generated cover direct and indirect costs while contributing to long-term financial sustainability?

Demand & Market Fit:
Is there demonstrated demand for this offering, or will you need to invest in generating awareness and building demand?

Scalability & Growth Potential:
Can this strategy scale over time, or will it require constant customization that limits growth?

Risk & Resilience:
What risks are associated with the strategy, and do you have contingency plans in place if demand or funding shifts?

Equitable Access:
Will this strategy maintain or enhance access for those who need your services the most?

Evaluating potential earned revenue strategies through these criteria will help you focus on approaches that not only generate revenue but also strengthen your mission and community impact over the long term.

How can acquisitions or partnerships potentially support earned revenue strategies?

When developing their earned revenue strategy, model sharers will often choose to build out the strategy using in-house capacity. This approach works best if the model sharer has the unique expertise or assets to be able to generate income directly, and gives the model sharer more control over the build-out process as well as revenue generation.. However, this approach requires time, investment, and the ability to manage the new effort effectively.

Alternatively, model sharers can look to pursue partnerships or targeted acquisitions to support earned revenue strategies. These options can be especially helpful if there are significant gaps in resources or experience to be able to run the strategy independently.

Acquisitions
can include buying existing assets, including tools, technology or other program or operational components. Incorporating an acquisition strategy can allow the model sharer to generate revenue quickly without the time and investment needed to build from scratch.

Partnerships

involve collaborating with an external organization to leverage shared resources, expertise, or audiences. Incorporating a partnership strategy can potentially reduce initial costs and speed up implementation, as well as help the model sharer mitigate risk.

There are a number of different types of partnerships that model shares can consider, and can range from highly formal, complex structures to less formal, simple alliances. Three typical examples of partnerships include:

Joint Ventures (JV):

In a JV, the not-for-profit and its partner form a separate entity to co-own the earned revenue initiative. This can be beneficial for complex, large-scale projects requiring both parties' resources and expertise. JVs often involve shared risk and reward, providing both organizations with a significant level of influence over the venture.

Collaborative Alliances:

These partnerships are less formal than JVs and allow each party to maintain full autonomy while collaborating on specific projects or revenue initiatives. Collaborative alliances can be ideal for not-for-profits looking to test a new revenue concept or pilot programs without major legal or financial commitments.

Co-branded Initiatives:

Through co-branded partnerships, not-for-profits can combine their brand with a partner to drive mutual benefits, including increased visibility and shared audiences. Co-branded initiatives can include product tie-ins, events, or cause-related marketing and are particularly effective for building awareness while generating earned revenue.

Explore 20+ Earned Revenue Strategies

Unlock new possibilities for generating mission-aligned revenue with this curated database of innovative strategies. Push beyond traditional models and find ideas that align with your mission and financial sustainability goals.

What's inside:

💡 **Inspiration beyond coaching, cohorts, and consulting**
Explore creative revenue models such as affiliate marketing, licensing, membership programs, and technology platforms.

💰 **Price ranges and benchmarks**
Access pricing insights to guide your strategy with real-world data on common earned revenue models.

📊 **Analysis of revenue-generating strategies**
Review pros, cons, and strategic fit to assess whether a strategy aligns with your mission and determine if it's worth pursuing.

Ready to explore?
Jump in and discover strategies that spark new revenue streams for your organization!

Click Here to Access the Earned Revenue Strategies

SECTION 3

Tools

This section provides practical tools and frameworks to help model sharers implement, refine, and sustain their earned revenue strategies. From financial modeling templates to pricing tools, these resources are designed to equip your team with the insights needed to make informed decisions. Whether you are at the beginning of your earned revenue journey or looking to optimize existing strategies, this section offers actionable guidance to build sustainable, mission-aligned revenue streams.

Tools for Building an Earned Revenue Strategy

Building a strong foundation begins with **casting a clear vision for financial sustainability**—one that aligns with your mission, values, and long-term goals. This vision serves as a guiding framework, ensuring that every financial decision supports your impact and community needs.

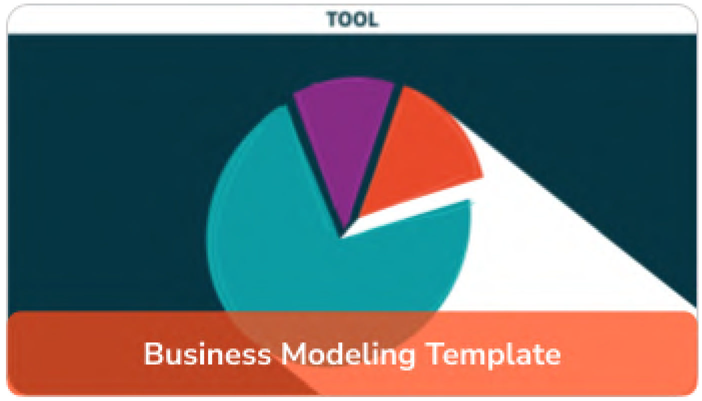
From there, model sharers can **develop business models for their offerings**, clearly articulating the target audience, marketing plan, and cost and revenue structure. A well-defined business model helps align earned revenue efforts with both operational capacity and the specific needs of the community.

The next step is **building a detailed financial model** that captures revenue projections, expenses, and growth plans for each offering. This tool allows organizations to get into the financial details, track progress, and assess whether their earned revenue strategies are on the right path to meet their sustainability vision. With these tools in hand, model sharers can make informed decisions, pivot as needed, and remain focused on achieving long-term financial health and impact.

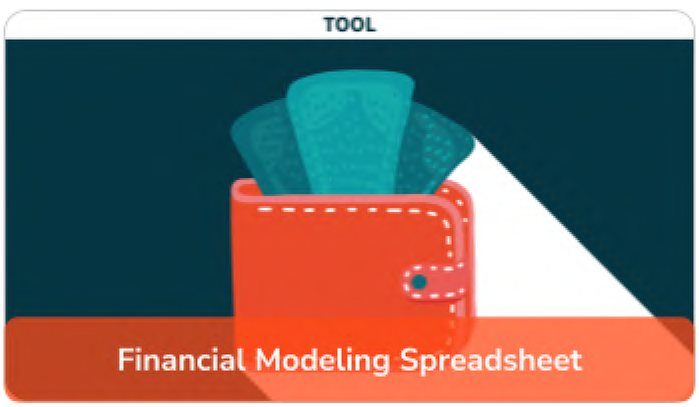
Take this self-assessment to help you understand where you are on the earned revenue journey. Receive customized recommendations and resources.

Click On the Image Below to Access the Tool

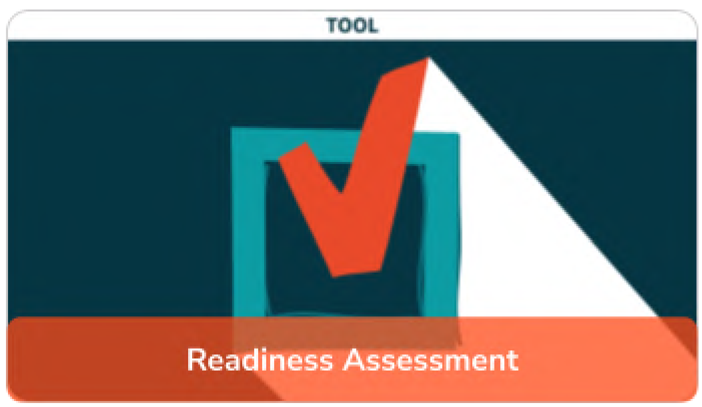
This template provides guiding prompts to help model sharers cast a compelling vision for financial sustainability. The resulting vision statement serves as a key anchor for all financial sustainability and earned revenue efforts, ensuring alignment across staff and leadership and providing clarity on long-term goals.



This tool pulls together all the key components of an offering—what it is, who it is intended to serve, the costs associated with its design and delivery, projected revenue, and marketing channels. It organizes these



A detailed spreadsheet designed to support model sharers in capturing multi-year revenue, growth, and expense projections. This tool ensures offerings are financially viable and positions the organization for long-term sustainability by identifying key revenue streams and cost drivers.



This tool provides criteria to evaluate whether an offering is ready to launch. It includes metrics for mission alignment, projected revenue, quality standards, and operational readiness, ensuring the offering has the "green light" to move forward confidently.