

# Philanthropy Begins at Home:

*Developing a Successful System for Board, Staff and  
Volunteer Giving*

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# Our Agenda

- ✓ Welcome and Introductions
- ✓ Why We Give
- ✓ The World of Fundraising & Philanthropy
- ✓ Creating a Culture of Philanthropy
- ✓ How To: Board Annual Giving Campaign
- ✓ How To: Staff Annual Giving Campaign
- ✓ How To: Volunteer Annual Giving Campaign
- ✓ Q & A

# Introductions

**Name**

**Title**

**Organization**

*The Alma Mater Exercise*

# Why We Give ...

## **Belief in mission**

Sense of satisfaction in giving

Personal affinity to cause

“Paying it Forward”

Legacy

## **Loyalty**

## **Because someone asked**

Relationship w/ member of org

## **Vested interest in the success**

Recipient of services

Compelling case stories

Positive impact/outcomes

Good fiscal stewards

Sense of urgency

“It’s the right thing to do”

Guilt

## **Past or current employee/volunteer**

## **Past or current board member**

Organization member

Had a positive experience or  
interaction

Event participant

## **Peer pressure**

Organization has a sound strategy

## **Habit**

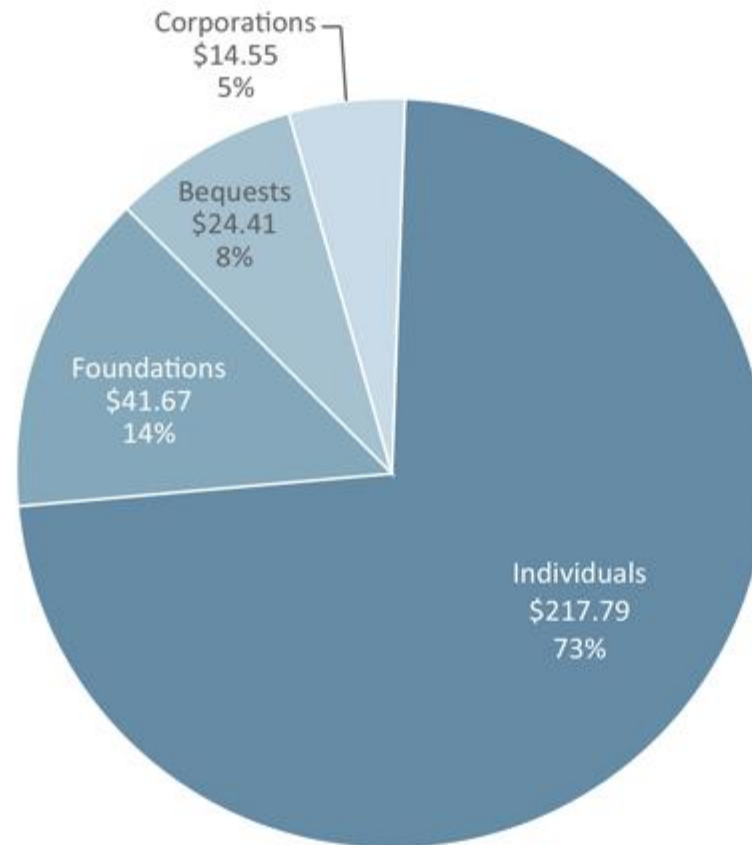
## **Recognition**

# What's Happening in the World of Fundraising?

# 2011 charitable giving

Total = \$298.42 billion

2011 contributions: \$298.42 billion by source of contributions  
(in billions of dollars – all figures are rounded)



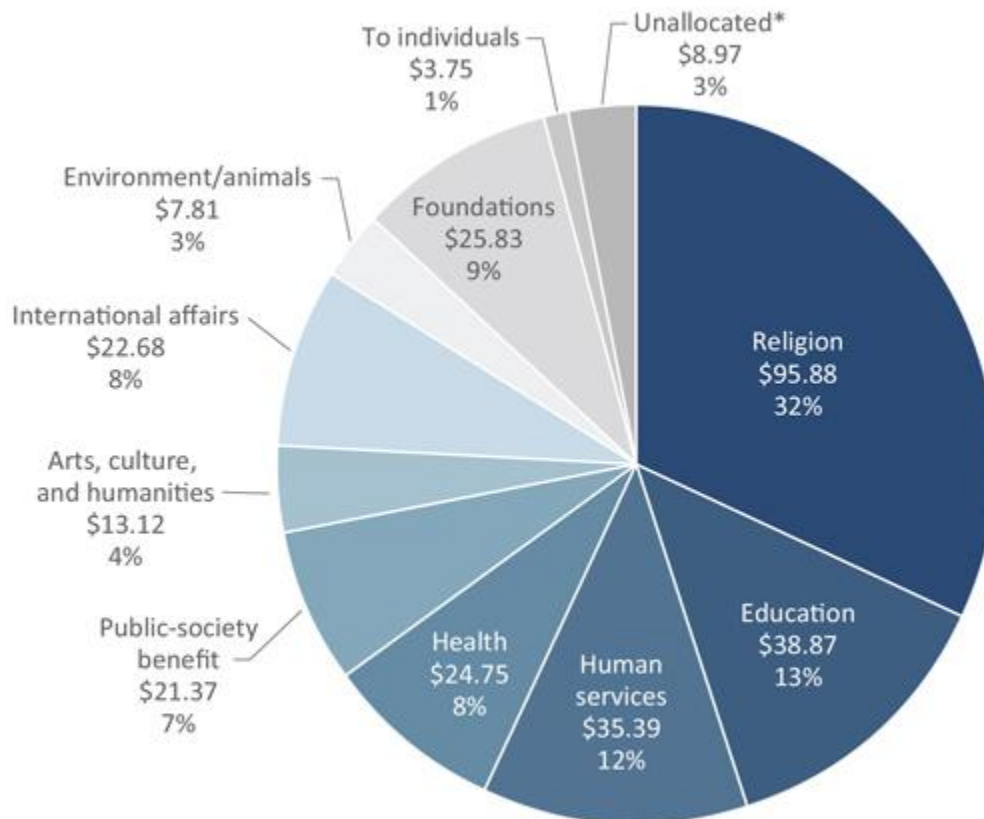
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# Types of recipients of contributions, 2011

Total = \$298.42 billion

2011 contributions: \$298.42 billion by type of recipient organization  
(in billions of dollars – all figures are rounded)



Includes rounding to get to 100%

\* Includes gifts to non-grantmaking foundations, deductions carried over, contributions to organizations not classified in a subsector, and other unallocated contributions

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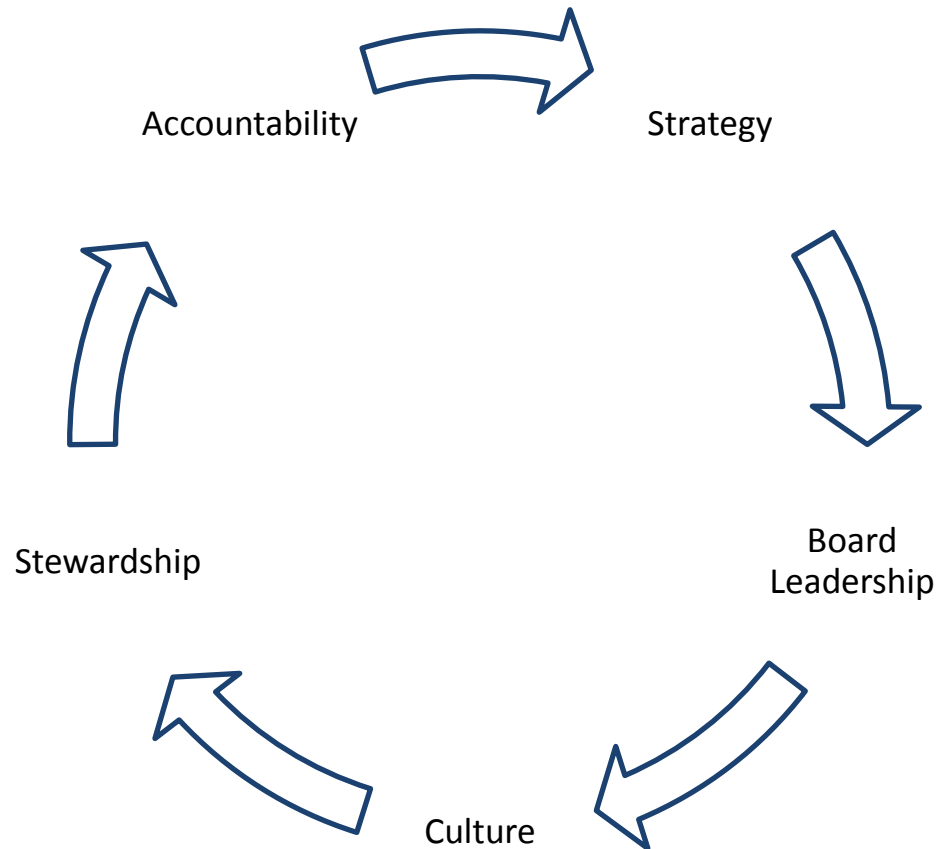
# Why Fundraising?

- The board and staff leadership is responsible for ensuring that an NPO has adequate resources.
  - *Fees for service, reimbursement from third parties, interest and investment income, membership dues, social enterprise, in-kind gifts, grants and contracts, and charitable contributions*
- When other revenue sources do not provide for adequate or reliable income – ***fundraising becomes essential.***



# The Integrated Fundraising Model

*Strategy, Commitment & Involvement*



# ***A Culture of Philanthropy*** Exists When...

*Most people in the organization (across positions) act as **ambassadors** and **engage in relationship building**.*

*Everyone **promotes philanthropy** and can **articulate a case** for giving.*

***Fund development** is viewed and valued as a mission-aligned program of the organization.*

*Organizational systems are established to support donors.*

*The **executive director** is committed and personally involved in fundraising.*

\*UNDERDEVELOPED: A National Study of Challenges Facing Nonprofit Fundraising 2013, CompassPoint and evelyn & walter HAAS JR. fund

# Creating Culture:

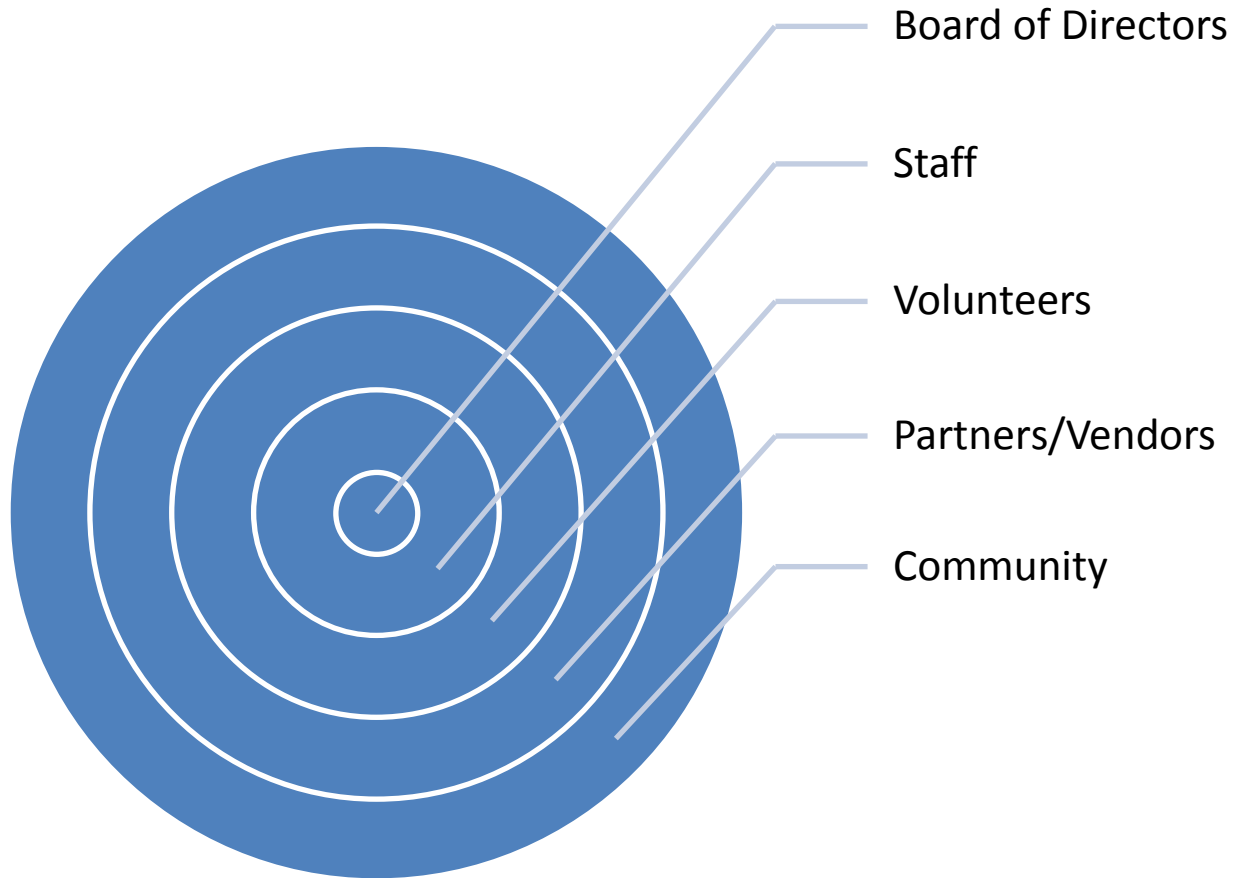
## *It's about more than one person*

\*Organizations and their leaders need to build the capacity, the systems, and the **culture** to support fundraising success

- ✓ Invest in fundraising capacity (technologies and systems required)
- ✓ Staff, ED and the Board are DEEPLY ENGAGED in fundraising as ambassadors, stewards and solicitors
- ✓ Fundraising is understood and valued across the organization
- ✓ Development Director is viewed as a key leader and partner in the organization and is integrally involved in organizational planning and strategy

*\*UNDERDEVELOPED: A National Study of Challenges Facing Nonprofit Fundraising 2013, CompassPoint and evelyn & walter HAAS JR. fund*

# Philanthropy Begins at Home



# Philanthropy Begins at Home

- It starts with recruitment [of board and staff]
- Job description / Orientation
- Organizations should ask the community for financial support only after those closest to organization have had the opportunity to give
- It's a requirement by some funders
- Remember: It's an honor to be asked

# 12 Steps to Success for ANY Fundraising Campaign

1. A **survey** is done prior to campaign launch
2. Sell something specific - think '**focused case for support**'
3. Involve others - clearly defined **job descriptions** for volunteers/committee
4. Strong/appropriate campaign **leadership**
5. Specific campaign **timeframe**
6. Target a **specific list of prospects**
7. Articulate a clear **goal**
8. **Marketing effort** reinforces the case for support
9. **Adequate budget/staffing** is in place for a successful campaign
10. **Celebration** of campaign's success/results
11. A **strategic donor stewardship plan** is implemented post campaign.
12. **Measure success and failures** – adjust strategy as needed!

# How To: Board Annual Giving Campaign

# Board Annual Giving Campaign

- Development Committee Chair and Board Chair Lead (peer-to-peer ask)
- Established timeline and goal
- Personalize board campaign appeal letter
  - Leadership gift has been made
  - Defined case for support
  - Giving history
  - Motivate giving (giving societies/circles) – ask them to consider moving to the next giving level
  - Appropriate signer



# Board Annual Giving Campaign

- Consider a comprehensive menu (one ask per year)
- Specific gift acknowledgment protocol
- Communicate progress and actively follow-up
- Celebrate success!

# **How To: Staff and Volunteer Annual Giving Campaign**

# Staff and Volunteer Annual Giving Campaign

## Create a Campaign Committee

*Develop a clear job description for committee members.*

*Establish a campaign timeline.*

*Who is viewed by staff/volunteers as having strong leadership qualities?*

*Who do others look up to?*

*Diversity (staff and volunteers representing various services/programs within your organization, age, gender, ethnicity)*

# Staff and Volunteer Annual Giving Campaign

**Seek to Understand Staff and Volunteers:**

**Consider a survey.**

*Why did you choose to work or volunteer here?*

*What about our mission resonates with you most?*

*Do you feel recognized for your contributions (paid time, volunteered time, philanthropy)?*

*Would you consider making a financial gift to the organization? Why? Why not?*

# Staff and Volunteer Annual Giving Campaign Make Giving Easy

*Pledge card/form*

*Website, Intranet, Social Media*

*Staff considerations:*

*Payroll deduction*

*Time off (ETO or PTO time)*

*Reimbursement (travel/expenses)*

*Organization's website or Intranet*

# Staff and Volunteer Annual Giving Campaign

## Motivate giving

*Giving levels/circles*

*Incentives*

*Celebration of results*

# Staff and Volunteer Annual Giving Campaign Other Considerations:

*Start small (keep it manageable)*

*Focused case for support*

*United Way Campaign (timing and communication)*

*Recognize, recognize, recognize*

*Share your success with the community!*

# The Staff /Volunteer Annual Giving Plan



# The Envelope Exercise

# Q & A

# Thank You!