

Study Guide for Virtual Donor-Driven Fundraising Events in a Post Covid-19 world!

Wednesday, July 15, 2020 from 11:00 AM to Noon PM EDT

These materials are being provided to you in advance as supplements to the upcoming virtual training hosted by the [Cleveland County Chamber](#) and presented by Fundraising Specialist, Dr. John Curtis.

Please be sure to have these materials available for use during the session since Dr. Curtis will reference them directly. You are welcome to duplicate these materials or use them in any way you like, you do not need permission from IOD, Inc. or Dr. Curtis.

If you have further questions about the meeting, please contact:

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Characteristics of a Culture of Philanthropy - Checklist

What IS Organizational Culture:

- ✓ *The values & behaviors that contribute to the unique social, emotional & psychological environment of the organization & is the foundation of it's productivity & performance*
- ✓ *Includes history, expectations, experiences, philosophy & beliefs that hold it together & is expressed in its self-image, inner workings, future plans & interactions with the outside world*
- ✓ *Is based on shared attitudes, beliefs & customs along with written & unwritten rules that have been developed over time & are considered valid*
- ✓ *Includes how the organization conducts business, treats its staff, those it serves & the wider community*
- ✓ *The extent to which freedom is allowed in decision making, developing new ideas & self-expression*
- ✓ *How information flows through its hierarchy & how committed employees are towards shared objectives*

| CHARACTERISTIC | ✓ check one | | |
|------------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|-------------------|
| | Unlike us | Somewhat like us | Very much like us |
| 1. We think donors should be included in our mission statement or statement of purpose | | | |
| 2. We believe one of our primary roles is to be a bridge between the needs of those we serve & our donor's values & interests | | | |
| 3. We are focused on producing results & measuring impact since donors are interested in making a difference with their investment | | | |
| 4. We focus a good portion of our time, energy & resources to serve donors, too, since they are part of why we exist | | | |
| 5. We create & expand programs & services that our donors will think are worthy of their investment | | | |
| 6. We regularly seek the input, opinions & ideas of our donors on how to make the organization more effective | | | |
| 7. We realize that our donors want to help change the world & we are bold in asking for their support in helping us do so | | | |
| 8. Everyone in the organization understands & fulfills their role in deepening relationships with donors | | | |
| 9. Donors are cherished & celebrated everyday not just when they give or its convenient to us | | | |

10. What factors exist in the organization that will help us build a Culture of Philanthropy?

11. What factors exist in the organization that may limit our ability to build a Culture of Philanthropy?

12. What is our most important next step we need to take to build a Culture of Philanthropy?

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Fundraising Readiness Review

This Review is designed to help you take a quick snapshot of your organization's readiness for fundraising. Select the response that best matches your opinion, then provide additional comments explaining your response. Answer as honestly as possible based on how you feel, most of the time.

1. How well does your organization currently perform fundraising?

Working Well, Needs Work, Don't Know / Unsure *(Please explain)*

2. Do you think you have the capacity and infrastructure in place to move forward with fundraising?

No, Yes, Don't Know / Unsure *(Please explain)*

3. Do you think you currently have enough financial supporters for successful fundraising?

No, Yes, Don't Know / Unsure *(Please explain)*

4. Would you be willing to make your organization one of your top philanthropic priorities?

No, Yes, Don't Know / Unsure *(Please explain)*

5. How do you think your organization is perceived? How do you know?

6. What specific experience or skills, if any, do you think you would bring to a fundraising campaign?

7. Based on your responses above what do you feel is your greatest strength in fundraising? Why?

8. Based on your responses above what do you feel is your greatest need for improvement in fundraising? Why?

9. What would make you feel more confident in your ability to be successful in fundraising?

Confidential

BUILDING A CASE FOR SUPPORT - YOUR GREAT DREAM BACKED BY A SOUND PLAN!

INSTITUTIONAL CASE

1. History & Mission - Founder's Story, Milestones, Dates, Initial Vision, Statement of Mission
2. Services & Programs - Statistical Data, Audiences Served, How you (will) make a difference, outline of specific activities, initiatives
3. People & Leadership - Founders, Board of Directors, Stakeholders, Advocates, Partners
4. Uniqueness & Distinction - How is the organization uniquely qualified to serve the community? Are there other organizations with a similar mission? If so, what is different about yours?
5. Finances & Stewardship - Annual Budget, Expenses / Income, Graphs / Charts, statement from Treasurer / Accountant, Individual Testimonies

PROJECT CASE

1. Future Vision

Where is the organization going to be in five years? What are the elements of the strategic plan that show a donor that the leadership has positioned the organization to meet the expanding needs of the community, the nation, or the world? Donors making large investments want to know the ways in which the organization will remain significantly productive, innovative and sustainable.

2. Immediate Investment Opportunity

What is your project and the associated dollar amount? Your project is called the "offer". The correct "offer" is the financial cost that underwrites your "idea!" Your "offer" should include a solicitation that underwrites three areas of your program:

- a. Operations Campaign (Three-Five Years) – What's the goal?
- b. Capital Campaign – (One Time Project) –What's the goal?
- c. Endowment Campaign – (Estate Plan) – What's the goal?

For many donors this is the most important part of your case. Supporters expect a high return on their philanthropic investment. Providing just the right amount of financial detail will demonstrate that your sound plan is achievable. You'll need to provide line items with costs that overview each aspect of the project. Make sure you strike the right balance. If you provide too much detail the information will be overlooked. If you don't provide enough your plan won't seem credible.

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CASE FOR SUPPORT... that Changes the World

The most important factor leading to success in major gifts planning is that the organization has a clearly articulated mission. Money "chases after ideas" and there will always be generous people who will amply support a GREAT DREAM backed by a SOUND PLAN.

What "idea" have you been entrusted with that changes the world in which we live? Is it an "idea" that donors will chase after? If so, how are you messaging that "idea"? Does your message... build confidence?... demonstrate achievability?... communicate lives will be changed?

CASE FOR SUPPORT... nothing else matters

A case is broadly divided into two sections...

#1 - INSTITUTIONAL CASE... Who We Are! #2 - PROJECT CASE... What We Want To Do!

The most important part of Case development is not the end, but the process. Working through this process with all interested stakeholders creates ownership and provides the organization sound direction giving supporters the assurance they need to make an investment decision.

When the "Case for Support" is finalized a "Case Document" can then be produced that answers many of the questions an individual, corporation, foundation, etc. would have regarding who you are, where you're going, and why you're inviting them to invest in your organization. Your "Case Document" is a written tool that gives volunteers and donors the confidence they need to advocate for you. In the end, a properly developed "Case For Support" turns friends into champions.

How it works

- ✓ Compelling Case for Support demonstrates that the organization is solid, knows where it's headed, and understands the scope of its mission and fundraising campaign.
- ✓ The process of determining the Case enables volunteers and champions to provide feedback which creates ownership of the nonprofit's mission.
- ✓ Field testing a case document allows the organization to measure support in the philanthropic marketplace before going public with an investment opportunity.
- ✓ The Case document assists a nonprofit in recruiting volunteer leadership to advocate on behalf of an exciting new project.
- ✓ A Case document establishes a basis for all other campaign materials (e.g.: campaign newsletter, press releases, gift prospectus, direct mail, brochures, website, etc.).
- ✓ Ultimately, a Case statement is used to motivate individuals to participate in three ways: by contributing with their finances, advocating, and volunteering.

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PUTTING IT ALL TOGETHER

The process of determining the project case (i.e. future vision & immediate investment opportunities) should be a thorough and arduous task overseen by the Founders and invested stakeholders. Bringing all volunteers together for the purpose of Case development can be very helpful. This moment provides the team a unique opportunity to:

- a. Understand what makes them different from other organizations with similar services.
- b. Define short-term and long-term goals which are consistent with their statement of mission.
- c. Determine the scope of a campaign that can be achieved within a certain time frame.

Additional Considerations

- a. Determine who is being targeted by the Case document. Different organizations have different types of donors. How does this affect content?
- b. Demonstrate to the target audience how the campaign advances the organization's mission.
- c. Delineate the financial need to accomplish the project and communicate it credibly.
- d. Meet with key donors individually and in focus groups. Meaningfully involve them in the process by sending them a draft for their input.

CASE FOR SUPPORT... ..YOUR GIFT TO THE WORLD

DON'T THINK YOUR TITLE CAN HURT CHARITABLE GIVING... THINK AGAIN!

Russell James, Ph.D. at Texas Tech University has recently completed a study of the Effectiveness of Fundraiser Job Titles.

“His findings should give your Development or Advancement Department reason to pause and, perhaps, move away from institution-centered titles to more gift-focused titles... his research shows that titles DO matter.”

In the past, some schools may have feared using words like donor or fundraising instead opting for terms like Development or Advancement. Now, however, the beliefs, attitudes and values that supported these obscure titles are outmoded and rapidly becoming ineffective as Christian Higher Education works to transform itself in the 21st century or risk extinction.

Philanthropy in the US has reached record levels and far exceeds pre-recession giving with the most recent research showing that charitable giving surpassed \$373 billion in 2015 and **giving to Education grew by 8.8 percent to over \$58 billion**, second only to **giving to religious organizations which is now over \$110 billion.**

Most important, giving by individuals amounts to over \$.72 of every \$1.00 Americans donate and this does NOT occur at golf tournaments, alumni banquets or annual mail appeals. Instead, those Christian institutions who are capturing an ever-increasing slice of the ever-growing pie of philanthropy are doing so by learning how to earn the right to solicit 5, 6 and even 7 figure gifts from major donors which brings us back to job titles... titles can hurt your fundraising efforts and should be taken seriously.

Dr. James surveyed 3,188 respondents to test 63 fundraising-related job titles in four charitable scenarios: 1) Charitable bequest gifts, 2) Gifts of stock, 3) Gifts of real estate, 4) Charitable gift annuities.

Development & Advancement Titles are all about you & NOT the Donor

Measured by which person donors would be more likely to contact to discuss each of these types of donations, the worst-performing titles were the traditional institution-focused fundraiser job titles, in particular those using “advancement,” “institutional advancement,” or “development.”

The survey shows that traditional institution-focused job titles are both the most commonly used and the worst performing. College leadership may do well to consider the donor’s perspective when selecting job titles for fundraisers rather than following traditional higher education practices leftover from the 1950s... actually make that the 1920s.

As Dr. James noted, “The term ‘development’ is most commonly used interchangeably with ‘fundraising’ today. However, the use of the term ‘development’ originated at Northwestern University in the 1920s and had a broad meaning that encompassed a variety of institutional objectives.”

Similar to the history of the term *development*, “advancement” originated from university fundraisers at the 1958 Greenbrier Conference. The original conference documents show that this conference “concerned itself with the internal mechanisms of the college or university, not its relationship with the rest of society, e.g. donors.

DON'T THINK YOUR TITLE CAN HURT CHARITABLE GIVING... THINK AGAIN!

Although institution-focused job titles remain common, philanthropy has or should (to capture a larger slice of the charitable pie) move toward the more successful donor-driven approach to fundraising.

1. Being **Events-Driven**, only, is often overused, stale and shows diminishing ROI. A major donor with the capacity to donate \$100,000 might give a “go-away” gift of \$100 or \$1,000 because \$100 is all you ask for on your mail appeal response card or \$1,000 is all that is required to be a Table Host at your annual banquet.
2. Being **Institution-Driven** means you have to constantly work to be heard among the noise in the marketplace and the appeal is all about you. *We are great stewards of your gifts, our programs are world-class, our students are making a difference and so on.*
3. Instead, being **Donor-Driven** means working to earn the right to help the donor practice their Christian beliefs or fulfill their personal values or carry on a family tradition by making an investment in the mission of your institution. **All philanthropic efforts are about the donor... but what is YOUR title?**

Worst Performing Titles

The job title generating the lowest overall likelihood of donor contact among all 63 tested was “Director of Advancement” and ALL titles containing the words *development* or *advancement* were found in the 10 worst-performing titles.

Best Performing Titles

Gift-focused titles appeared to perform better with “Director of Donor Guidance at #10 of 63, “Director of Donor Advising” #5 of 63, and “Financial Advisor for Donors” #1 of 63. The top three performing titles included “donor” and all referenced a positive benefit for the donor, i.e. guidance, advising or financial advising.

Aside from the general trends related to institution-centered, donor-centered, and gift-centered titles, a few other items of interest emerged in Dr. James research.

- ✓ The results strongly support the relative ineffectiveness of the traditional institution-centered titles using *advancement* or *development* to encourage donor contact to discuss charitable giving.
- ✓ His results also suggests that one effective approach to titles is to address a “donor versus institution” conflict is to, instead be “gift centered.”
- ✓ The fundraiser focused on “gift planning” appears as one who has knowledge and experience, especially in the context of complex donor scenarios, and can thus be a valuable resource for the donor without having to make an express representation of “donor versus institution” allegiances.

The bottom line is that we now have empirical research that shows titles DO matter and changing job titles alone to more gift-centered will enhance donor perceptions. Most important, however, is that IF your fundraising function is nonexistent, underperforming or even doing well, this study might be an interesting conversation starter at your next Administration or Board meeting.

DONOR CAPACITY & INTENTIONALITY SCORING MATRIX
(How much can they give & how likely are they to give?)

Donor's Name _____

Who should do the "Ask" _____

| CRITERIA | Score x Weight (1-5) | = Total |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|---------|
| 1. Belief in our organization How high is their regard for us? How do we know? _____ | _____ x 2 | = _____ |
| 2. Potential shared values with our campaign Are their personal convictions consistent with funding our needs? How do we know? _____ | _____ x 3 | = _____ |
| 3. Major gift potential Are they financially capable of making a larger / major gift? What is their history of giving to us? _____ | _____ x 3 | = _____ |
| 4. Interests in our campaign Have they expressed a preference in any particular aspect of our funding efforts? What is it? How do we know? _____ | _____ x 1 | = _____ |
| 5. Naming opportunities What aspect might they want to align with, invest in or leave as a legacy? What is it? How do we know? _____ | _____ x 3 | = _____ |
| 6. Community philanthropy Have they invested in other similar organizations? Who / When / How much? _____ | _____ x 2 | = _____ |
| 7. Donation timing Have they received a large windfall / need tax relief? How do we know / Is it public? _____ | _____ x 3 | = _____ |
| 8. Leadership potential Will this donor be an advocate / attract others to our campaign? How do we know / What is their "draw?" _____ | _____ x 2 | = _____ |
| 9. Inhibitors to supporting our Campaign Have they expressed any concerns / issues with our campaign? What was / is the issue? _____ What was / is our response? _____ | _____ x 3 | = _____ |
| Total Points: | | _____ |

