



To Give a Goat.... The Holiday Dilemma

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About Gena Rotstein

20+ Years non-profit and social enterprise
sector experience

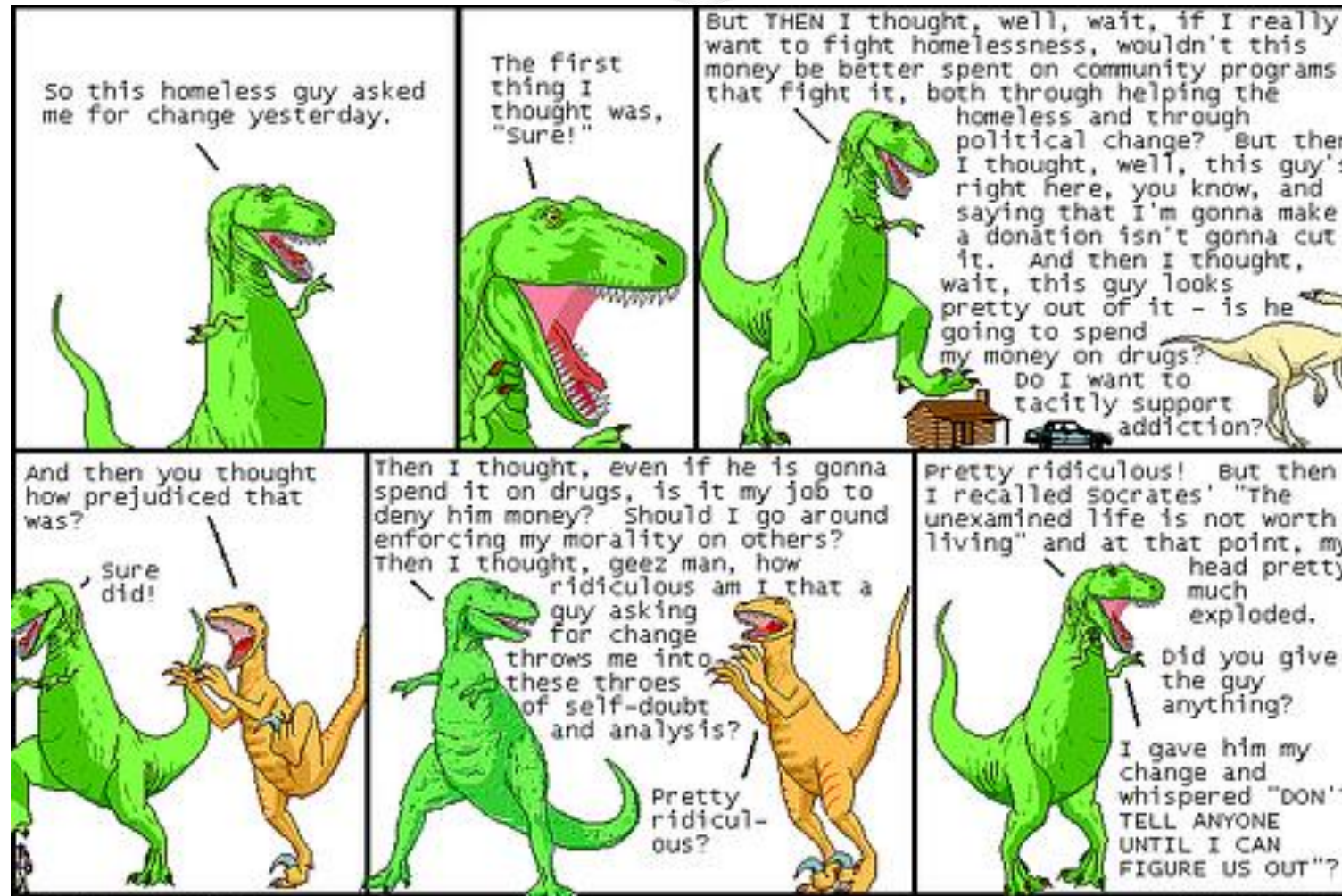
Executive Director of Place2Give Foundation
– Donor Advised Fund

Daughter of Entrepreneur; Third Generation
of an Enterprising Family

Sister, Aunt, Dragon Boater, Geek, World
Traveler



- Welcome & Introductions – Jessica
- Donor Profiling: “The life I live is created by the story I tell” – Abraham Hicks
 - Orienting Story – Personal Reflection
 - Legacy Questions
 - Money Messaging
 - “Body mapping” – Preschool upwards: Multi-generational perspectives on giving
 - Family values & visioning – Individuals and couples
- What does this have to do with a goat?
 - Evaluating Charities
 - Charity case study(ies)
 - Meaningful Giving: What is a Giving Portfolio?
- Business of Philanthropy (If we have time)
 - Philanthropy 3.0 - Philanthropic intent but not charitable donations
 - Vehicles for Giving
 - Aligning investment strategies with giving objectives
 - Tax planning
 - Odd donations
- Other Activities
 - 21 Toys
 - Giving Quest



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- How does life experience influence your perception or even engagement in philanthropic activities?
- Does your culture, religion or spirituality play a role in how you engage in charitable activities?



- What does having money do for me? [Answer #1]
- What does [Answer #1] do for me? [Answer #2]
- What do I feel when I have [Answer #2]? [Answer #3]
- And what else do I feel when I have [Answer #3]?



Legacy Interview Questions

Handout

“The life I live is created by the story I tell” – Abraham Hicks

Money Messaging

Packets – Discussion in pairs



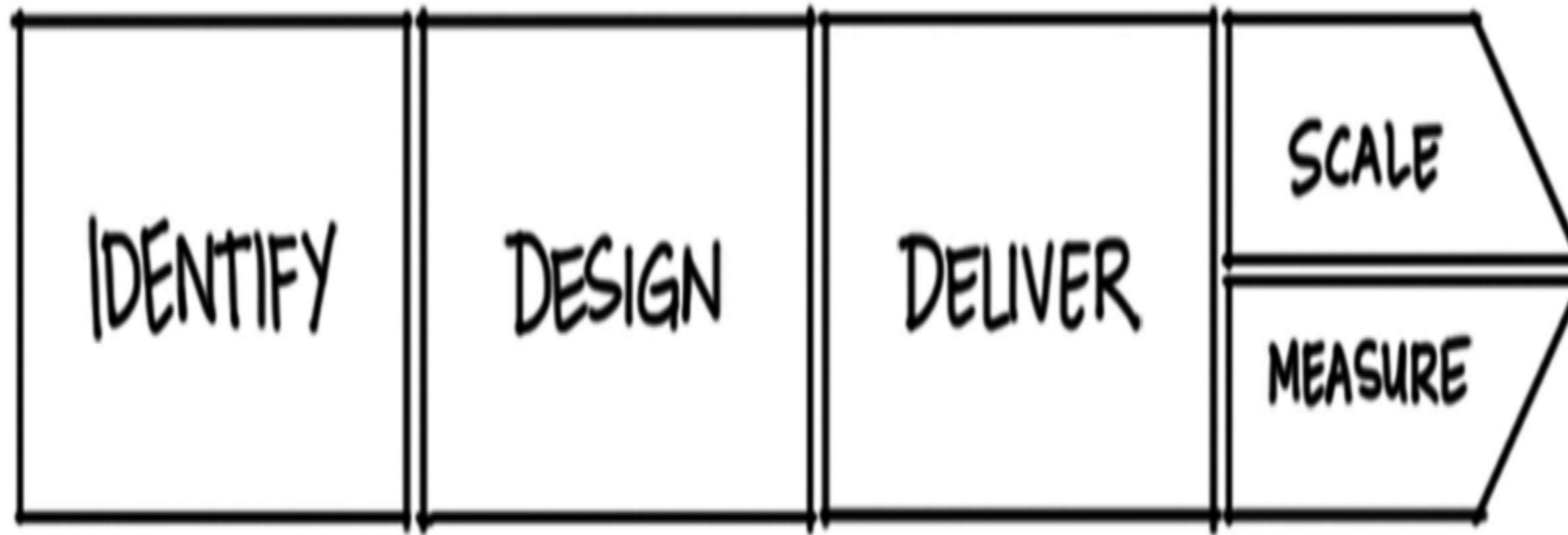
What is Strategic Philanthropy?

The process of identifying what you want to see society look like, and using philanthropy as one of the tools for achieving that vision

The Charitable/Philanthropic Plan is the coordinated steps in achieving the vision



Source: Collective Impact – Kramer, FSG Consulting



D-Rev - Mulago Foundation

Identify high impact opportunities that can increase incomes or improve the health of 1 million+ people living on less than \$4 per day.

Design products to meet customer needs, incorporating manufacturing, distribution, and servicing.

Deliver to users by integrating the product into the market to maximize sustained impact.

Scale up appropriately for maximum global impact and measure impact to determine that the product is reaching the people and places who need it.

What are the events in my time that have influenced who I am and how I operate?

How does the outside world perceive me?

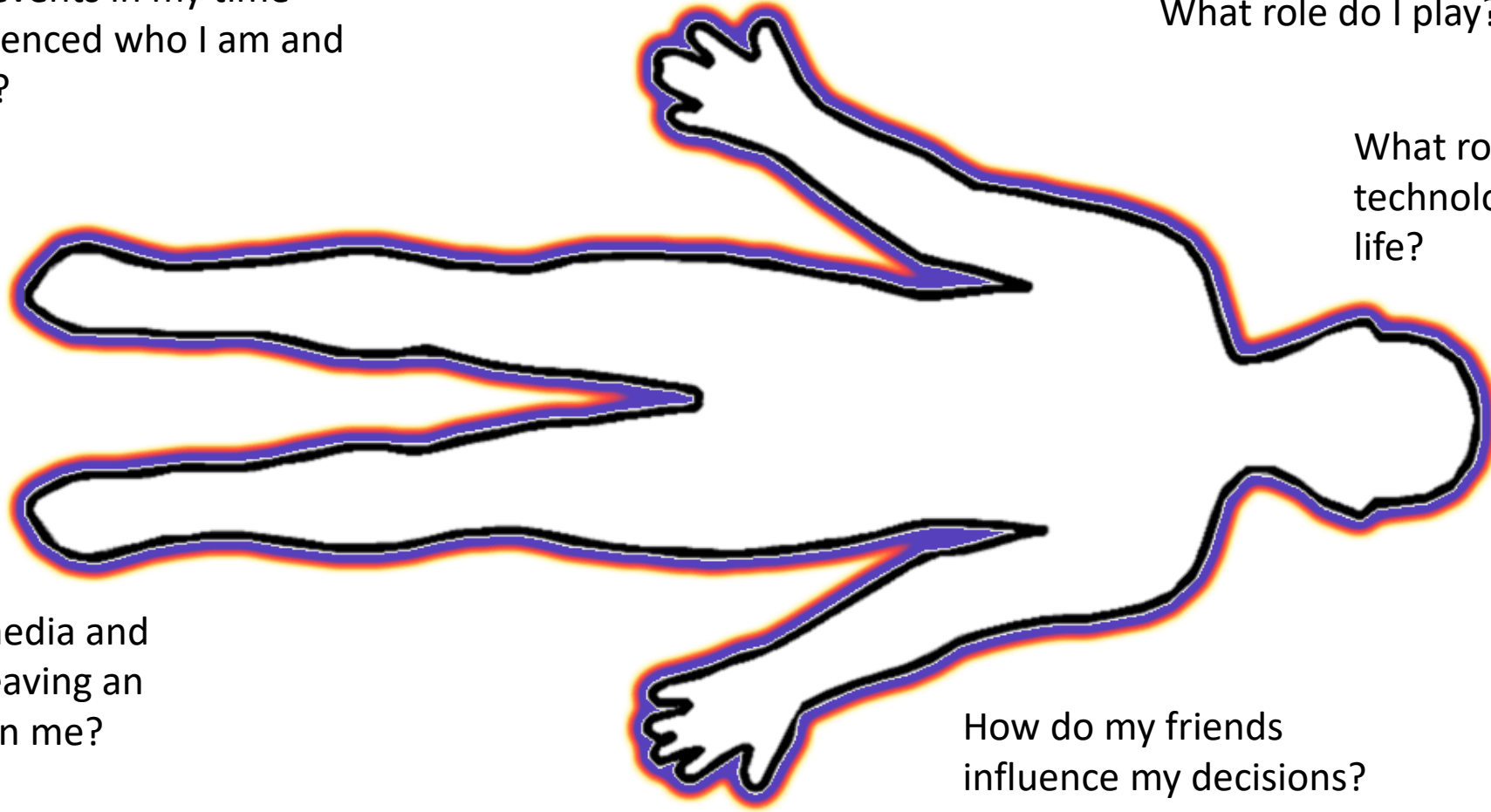
How do I perceive the world?

How is the media and Hollywood leaving an impression on me?

What role do I play?

What role does technology play in my life?

How do my friends influence my decisions?



- Donation advisor/influencer
- Vetter of options
- Transactional
- Solution creator
- Asset manager (Investment committee)
- Sponsor
- Participant
- Consumer
- Connector

Maverick

Informed

Steady



- Cheque-book Philanthropy
- Responsive Philanthropy
- Venture Philanthropy
- Results-Based Philanthropy
- Collaborative/Network Philanthropy

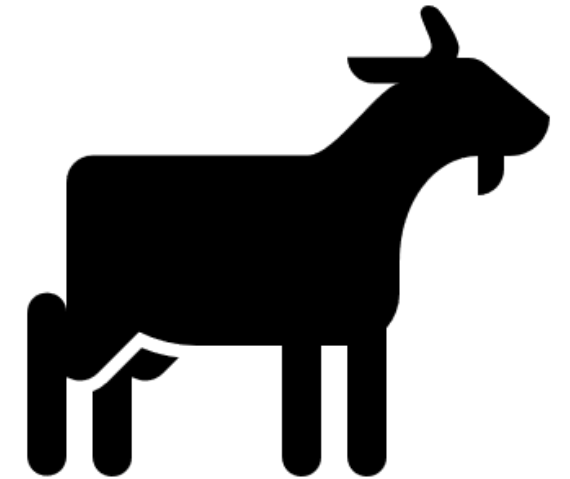
Donor Profiling



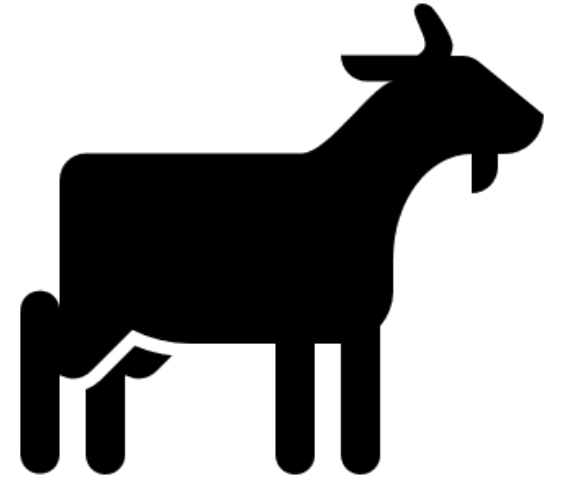
Benchmarks for Evaluating Charities

- Leadership
- Program Implementation
- Community Engagement
- Volunteerism/HR
- Governance (policies & procedures)
- Funding & Financials

- Level one – Needs based giving
 - Front-line charities
 - Band-aide solutions
- Level two – Empowering Individuals
 - Funds are a one-to-one or a one-to-many experience
 - Seeing your money put to work in the life of an individual
- Level three – Capacity Building
 - Supporting organizations that help other organizations
 - Investing in an agency's operational effectiveness
- Level four – Networked Philanthropy
 - Leveraging your network to further the issue



- Activity – 10-15 min.
 - Review the charity case studies with the following in mind
 - Do you understand what the issue is that is being solved/addressed?
 - Do you know if they have made a difference on the issue?
 - Do you have a sense if they have been successful?
 - Do you have an understanding of where the pitfalls or challenges are that the organization faced?
 - Would you invest in this organization? Why?



Values & Vision Cards

What is the legacy that I want to leave?

What is the impact that I want to achieve?

Who is the funder that I aspire to be?



- Leadership

- Qualifications
- History & Connectedness
- Board engagement

- Governance

- Strategic v. Operational Board
- Policies to protect donors and clients

- Community Engagement

- How do they work with others in their industry?
- Media

- Program Implementation

- Capacity to report on long term effectiveness
- What is success?

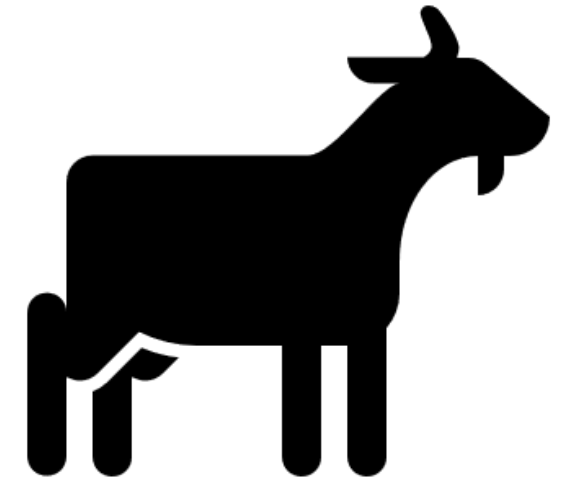
- Volunteerism/HR

- Hiring policies
- Staff & Volunteer turn-over

- Financial Management/ Fundraising

- Overhead → Operational Effectiveness
- Diversified funding portfolio

- Identify areas of giving are most important
- State how you want to be involved
 - Little contact
 - Attend meetings
 - Highly engaged
 - Active Donor
- Articulate who is involved and how
- Audit past giving
- Create a portfolio of responsible, well managed charities that will deliver impact
- Align giving with investment/asset management strategy
- Establish a disbursement program that balances client interests (i.e. social vision realization, tax planning) with charity impact
- Report on impact vs. funding



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Keep in Touch!!!