

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	✓○○○○○○○○		
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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?

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?

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

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.

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: _____