



Partnerships for Philanthropic Expansion



December 18, 2018
1:30 pm Eastern

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Who is here today?

- Role in the organization/in philanthropy
 - ↳ Lay Leadership (Board or Officer)
 - ↳ CEO/ED
 - ↳ CDO/Director of Development
 - ↳ Other
- Percentage of time spent on philanthropy – how do you track?
- Tenure with your current organization

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Your KEES Team

<p>Heather Eddy, President and CEO</p> 	<p>Alison Lewin, Project Director</p> 
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 **THE AGENDA**


Today We Will Cover:

- ▶ Maximizing Philanthropic Capacity with Today's Reality
 - ↳ Today's Philanthropic Environment
 - ↳ What Does This Mean for Your Agency?
- ▶ Roles Everybody Plays in the Philanthropic Process
 - ↳ Setting Expectations
- ▶ How to Build a Cohesive Team Focused on Philanthropy

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Maximizing Philanthropic Capacity with
Realities of Today



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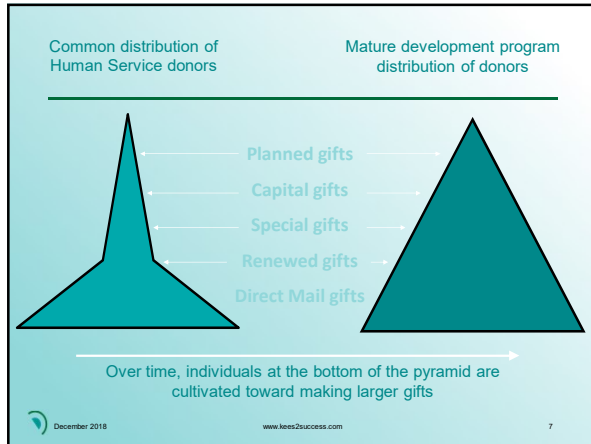
Giving USA
Annual Report of Philanthropy in America

Report Highlights ~ 2018

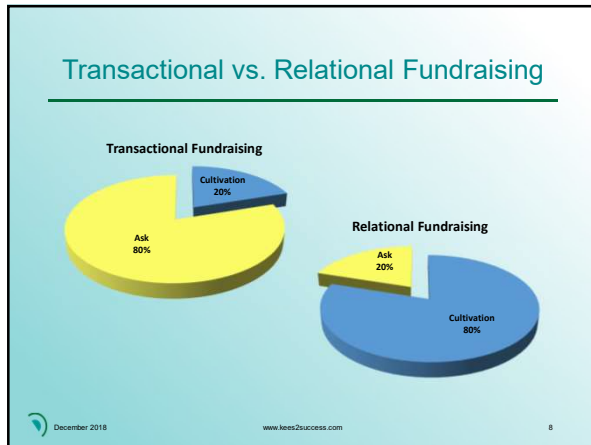
- ▶ Annual Report compiled for 60+ years; longest continual report in the United States
- ▶ More than \$401 billion given to USA nonprofits in 2017
 - ↳ 5.2% increase over 2016
 - ↳ Largest increase (% and #) in recent years
 - ↳ First time ever that giving has surpassed \$400 billion
 - ↳ Individuals account for 79% of all gifts
 - ↳ Higher if include Family/Personal Foundations and DAFs

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Giving USA
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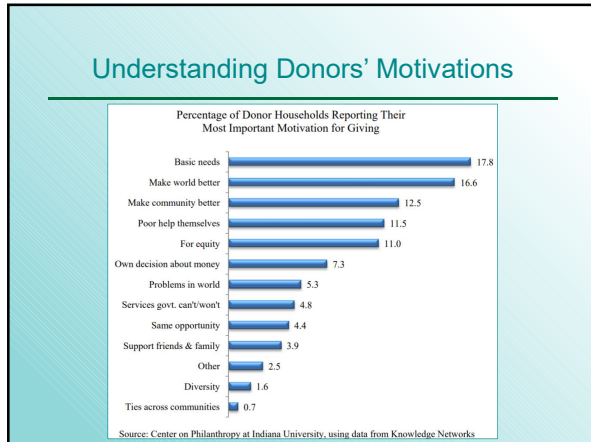
Continued...

- ↳ Giving to Religion grew by 2.9%
- ↳ Giving to Human Services grew by 5.1%

*What motivates your donors?
How do you know?*

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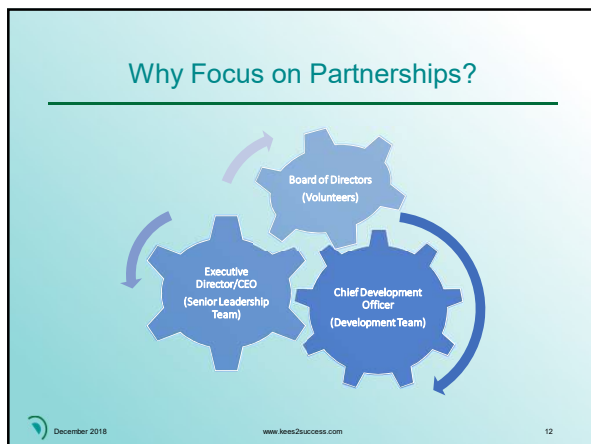
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Defining the Roles of Each Partner



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Types of Nonprofit Boards

Where are we now? Where do we want to be?

	Founding	Manage	Leading	Governing
Board Members	Lots of time – do everything	Willing to work – takes on projects	Some Managing – Some “doing”	Policy setting and strategic oversight
Composition	Founders + Family	Founders + Friends	Professionals	Strategic Composition
General Focus	Survival and Structure – proving worth	Operations	Managing	Leading
Planning Focus	Everything / Day to Day	Day to Day / short-term	Long range	Strategic – 5+ year vision
Fund Raising	Events – high activity/low dollar ROI	Events / Grants	Events / Grants / Some individualized approaches / other functions	Comprehensive, Integrated Development Program; Philanthropic Board
Board/Philanthropic Role	Viability/All Resources	Ongoing Existence	Shared function	Supporting ambassador
Staff	None	1 – 3 Generalists	Reporting/Management Structure – somewhat flat and fluctuating	Fully developed staff structure / Specialized talents

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Culture of a Philanthropic Board

Evolving Fundraising Function	Mature Culture of Philanthropy
• Funding request based on needs of organization	• Funding request based on instincts, desires of donor
• Revenue-oriented: “budget shortfall”	• Donor-oriented: “put your resources to good use”
• Short-term horizon	• Long-term horizon
• Topic of philanthropy avoided as awkward, stressful	• Philanthropy taught, modeled for others
• Some Board members participate	• 100% Board participation
• “give until it hurts”	• “give until it feels good”

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Transforming to a Philanthropic Board

Stages of Evolution

Ambassador	"I will ask others to give"
Advocate	"I will ask others to become involved"
Donor	"I will advocate the organization to others"
Volunteer	"I will give again (annually)"
	"I will give"
	"Giving is important"

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Overview of the Board's Role

Board of Directors/Governing Body

- Primary Duties
 - Care, Loyalty, Obedience (legal)
 - Being Present
- Fiduciary Obligations
 - Conflict of Interest
 - Organization's Assets
- Leadership Responsibilities
 - Chief Executive: Hire, Establish Expectations, Evaluate
 - Ambassadorship
 - Garner Resources



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Adopt A Performance Matrix Mindset for Everyone on "the Team"

- Set Measurable Monthly and Annual Goals for each team member:
 - Lay Leadership/Board
 - CEO/Executive
 - Development Staff
- Convey Verifiable Cultivation Activity Expectations.
- Provide Recognition of Accomplishments.
- Benchmark Areas of Improvement for each Team Member.
- Create A Motivated Working Team Environment and Celebrate Success.

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Marketplace Data

What CEOs, CDOs and Board Members are saying...
and what they expect.



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Keys to Philanthropic Success

Top responses from Chief Development Officers:

- Engagement, branding, public relations
- Clearly communicated mission and programs
- Cultivating relationships with donors at every level – individuals, corporations, foundations

Top responses from CEOs and Executive Directors:

- Showcasing/presenting top-performing programs and events
- Managing relationship with major donors, and having a broad base of donor support

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Board Members and Volunteers: Relationship Insights

What is the single action that the **CEO/ED** takes that **best propels** the philanthropic process?

Top Responses:
"Advocacy and staying on message", "community involvement", and "personal involvement in fundraising"

What is the single action that the **CDO/DoD** takes that **best propels** the philanthropic process?

Top Responses:
"Identifying and prospecting donors", and "clear communication and expectations" – making sure the ED and Board are well-informed

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Chief Development Officers: Relationship Insights

What is the single action that your **CEO/ED** takes that **most supports** the philanthropic process?

Top Responses:
"Interfacing with donors", "making the ask" (especially for major gifts), "visibility" at meetings and community events

What action do you wish your **CEO/ED** did **differently** to support the process?

Top Responses:
Increase the frequency of calls and meetings with donors *"more calls and meetings", "more higher-level donors"*
Build a *"culture of philanthropy", "engage the Board/alumni"*

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Presidents/CEO/Executive Directors: Relationship Insights

What is the single action that your **CDO/DoD** takes that best propels the philanthropic process?

Top Responses:
"Individual donor outreach", "grant writing and research", "special /annual fundraising events"

What action do you wish your **CDO/DoD** did *differently* to propel the process?

Top Responses:
"More face-to-face meetings with donors", and "build relationships" with long-term and major donors

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Characteristics of a Great Fundraising Team ABILITY

- ☞ To clearly and collaboratively communicate the mission, listen to the needs of the donor, make the 'ask' and steward the gift.
- ☞ To multitask without stress using business processes and protocols to handle funding priorities and cultivation activities.
- ☞ To be creative, spontaneous, supportive and humorous in team and donor interactions.

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Characteristics of a Great Fundraising Team
CREATE

- A collegial, fun-filled, exciting fundraising environment.
- A 'service mentality' among all fundraising activities.
- A central focus on communicating, communicating...and more communicating.

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Suggestions to Grow Philanthropy

- Increase number of asks annually
- Customize/Segment appeals
- Increase stewardship
 - ↳ Engage Board/Leaders/Volunteers in meaningful ways
- Focus on individuals
 - ↳ "Pipeline" Development
 - ↳ Major Gifts
 - ↳ Event Engagement and Follow Up
 - ↳ Mission Focus
 - ↳ Case Statement/Telling our Story
 - ↳ Customization
 - ↳ Outcomes
 - ↳ Donor Intent
- Grow Board Culture of Involvement in Philanthropy

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About KEES

MISSION:
To build transformative teams and leaders

PRIMARY SERVICES:
Leadership Consultation
Executive Search
Specialty and Interim Staffing
Human Resource Consulting

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THANK YOU!

presented by:

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