

Culture of Philanthropy Checklist:

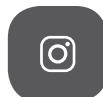


How to instill passion for donors into the hearts of everyone associated with your charity

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It takes a village to inspire philanthropy.

One person — a development director, executive director, board president, etc. — does not a culture make. Nor does two people. Or three (unless that's the sum total of all of your staff and volunteers).

Philanthropy requires all hands on deck. Without this, you're not going to accomplish anywhere near what you could, or should. Just one person who doesn't "get it" can undermine the work of everyone else.

Want to know what it takes to destroy your nonprofit's reputation as a force of goodness in the world? To destroy the good work of nonprofit development staff endeavoring to build strong relationships and loyal bonds with donors who want to change the world?

- One rude receptionist.
- One program staffer who doesn't return phone calls promptly.
- One harried volunteer coordinator who doesn't listen closely.
- One colleague who says, "That's not my job."
- One co-worker who insists "That's not my priority."
- One board member who says, "Development need not be on the agenda."

When given the chance, does everyone in your organization connect and care?

Your organization has a culture of philanthropy. Or it doesn't.

Do you have a culture of philanthropy?



Use this checklist to fill in the box with “T” for True or “F” for False. If you find you’ve chosen “False,” refer to the **ACTION TIPS** that follow.

Mission, Vision and Values

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The role of philanthropy in advancing our charity’s mission and values is clearly articulated in writing for all to see (e.g., strategic plan, board and employee handbooks, job descriptions).

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We find numerous opportunities to articulate and share the critical role philanthropy plays in furthering our mission (e.g., at meetings, on staff and board intranet, in publications, on our website).

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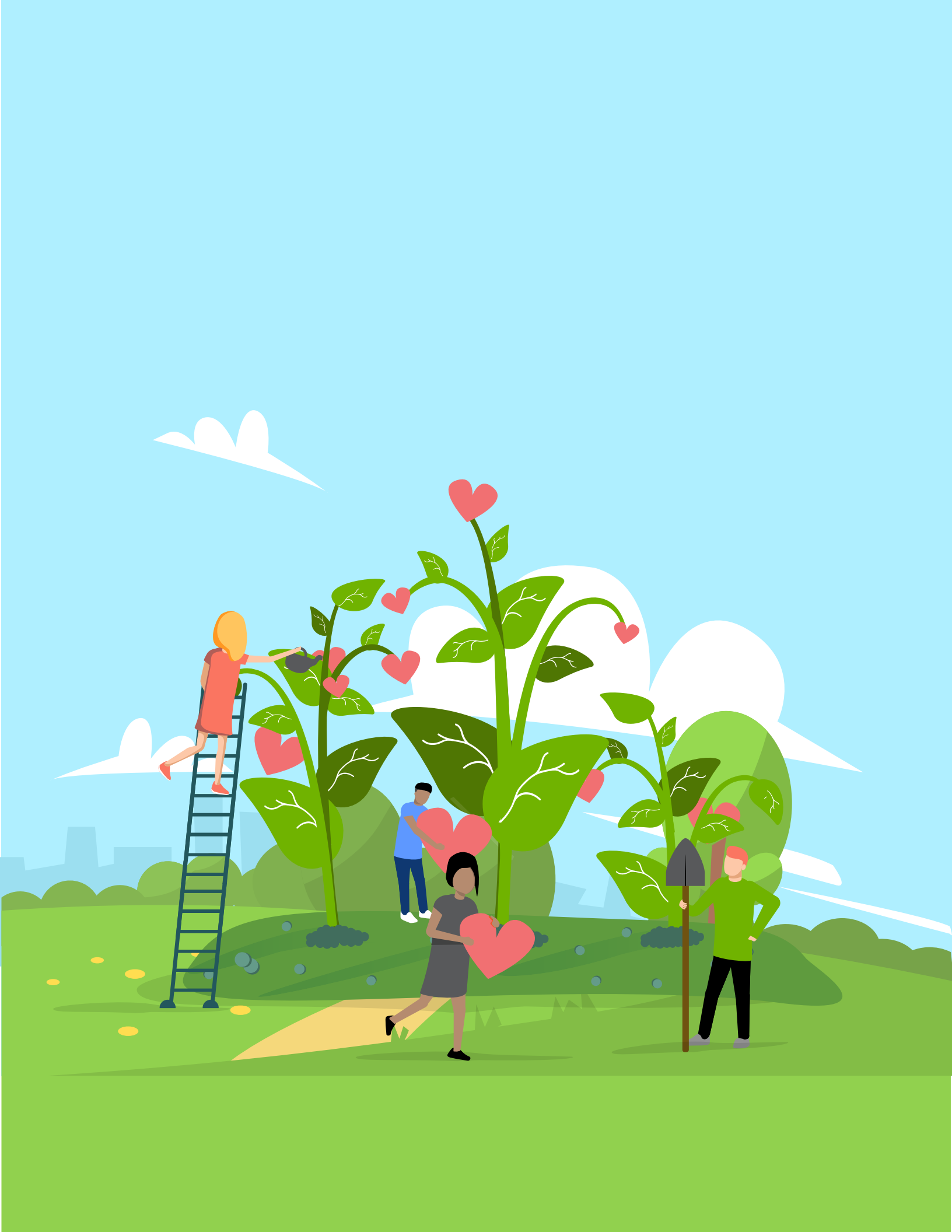
Serving donors and helping them express shared values is central to our mission; they’re not just a means to an end.

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We formally welcome and orient all staff and board.

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Everyone in our organization knows and tells the story of why we exist and persist.





ACTION TIPS

Assure everyone is well-informed of philanthropy's impact, and understand what would happen were you to cease to exist. Board and staff must see how fundraising "fits" within the organization and how it is essential, noble work. The more you help people understand how philanthropy powers your vision and enables the organization to sustain, strengthen, and expand its service, the more cooperation and ownership you'll encourage.

- **Articulate how your organization is financed/funded.** Present an overview in your strategic plan, board and employee handbooks, job descriptions and orientation for new staff and board members.
- **Clarify which programs philanthropy makes possible.** Summarize what would change if those funds were to dry up.
- **Consider having a development staff member attend other department staff meetings once a month.** Celebrate the contributions made by program staff members and report back on how their work has recently inspired philanthropy.
- **Invite program staff to sit in on development staff meetings.**
- **Have development staff members shadow program staff members in the field.**
- **Embrace donors as part of your mission.** Share stories demonstrating how donors experience joy and meaning through philanthropic giving.
- **Share stories demonstrating how the story of why you were founded continues to be expressed and have relevance today.**

Management and Planning

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We encourage open collaboration, rather than operating in silos.

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We incorporate development objectives into all department plans, not just development department plans. (e.g., creation of volunteer, ambassador and advocacy opportunities, fundraising goals, communication goals, measurement, tracking and reporting goals).

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We clarify responsibility for donor service in all job descriptions.





ACTION TIPS:

Create opportunities organization-wide to engage in development activities. Understand everyone either contributes to making philanthropy happen, or to making it unlikely for it to happen. No one is exempt. Donors don't care which department someone works in. They only see one organization. There are many ways for staff, board, and volunteers to contribute, ranging from identifying potential donors to cultivating relationships, soliciting gifts and thanking and stewarding donors.

- **Include development responsibility in the job description of each employee** (e.g., an expectation that each co-worker will devote at least 10% of his/her work hours to development-related activities, appropriate to the position the individual holds in the organization).
- **Develop an organizational “story bank.”** Ask staff to contribute stories that can be shared with donors.
- **Regularly provide updates.** When gifts are received and allocated to programs, alert program staff of the necessity to report back to donors on progress towards desired outcomes.
- **Create management systems for acknowledging and reporting back to donors in a compelling and timely manner.**

Leadership

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Our leaders walk the talk.

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Our leaders are transparent about every aspect of our charity's business.

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Our leaders listen more than they talk.

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Our leaders embrace change.

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Our board members are our biggest cheerleaders. They don't hesitate to ask their networks to join them in the cause they love.





ACTION TIPS:

There's no substitute for leading from the top. The E.D. and board must preach on the value and necessity of philanthropy in furthering the organization's mission, vision and values. It must be clear that donors are valued participants in your mission and all staff are their equally valued partners. Development must be seen as the responsibility of every member of the leadership team, whether staff or volunteer.

- Have staff leadership discuss the importance of philanthropy to the organization at all-staff meetings, executive team meetings, supervisors meetings and at public gatherings.
- Have staff leaders discuss the role of philanthropy at department meetings.
- Include development on the agenda at every board meeting.
- Invite development staff to attend every board meeting.
- Develop systems for keeping everyone in the loop about fundraising needs, opportunities and progress toward goals (e.g., intranet, newsletter, access to documents in Dropbox).



Staff

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Our employees are the biggest believers in our mission.

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Our employees all know our stories.

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All staff are valued contributors to the mission, and there is mutual respect for each other's work.

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We invest in, and nurture, staff learning and growth.



ACTION TIPS:

Make a shift towards a gratitude culture. Connect the dots for each other. Make it clear that philanthropy happens because of needs being successfully addressed by your entire organization, not just because of development staff. It takes a village. Make all of your staff and volunteers the heroes by practicing gratitude continually.

- **Make it a regular practice to tell other staff and volunteers what a great job they did.** Remind them it is their work that resulted in an act of philanthropy to continue your mission.
- **Make “how can I help you today?” a standard way employees greet one another.**
- **Encourage multiple points of contact so donors feel connected to programs and vice-versa.**
- **Appreciate staff by encouraging and subsidizing learning opportunities.**

Donor Service

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Customer service is a top priority for all staff.

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We know our donors' passions and desires and how they match to our mission.

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We know based on evidence, not anecdote, which programs our donors most want to invest in.

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Our donors trust us.

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Our donors feel our gratitude, caring and love.

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Our donors do not feel exploited or talked down to.

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Our donors feel part of a connected community and know they're part of the solution.



ACTION TIPS:

Make donor service your top priority. Commit to truly incorporating an attitude of gratitude into your culture. For-profits retain more than 90% of their first-time customers. Nonprofits only keep 32% of their first-time donors. Why? There's a big difference between "The customer is always right" and "Donors are a necessary evil."

- **We know from research that the single biggest driver of donor loyalty is the service they receive.** Every contact with donors must contribute towards the goal of building satisfaction, commitment and trust. This must be part of everyone's job.
- **Regularly survey and/or interview donors.** Determine their interests and communication preferences.
- **Make customer service part of new employee orientation.** Make it part of your employee handbook. Include it in job descriptions and performance evaluations. Become the Nordstrom of nonprofits.

- **Create awards for top donor service.** Publicly recognize staff who go above and beyond.
- **Talk internally about what you're grateful to your donors for.** Then set aside some organization-wide time for saying thank you [see [Borrow from Jimmy Fallon to Keep More Donors](#)].
- **Set aside 20 minutes at the end of the day once a week to come together to share stories of donors.** Give details about the individuals whose lives have been changed by the donors' gifts and the internal constituents who had a role in bringing about the donors' gifts. This helps to impress upon staff the difference their actions, words and witness can make in bringing about gifts to your organization (serve refreshments)!



Keys to Living and Breathing a Philanthropy Culture

How do you get folks to step up to play their appropriate fundraising roles, whether direct or indirect? How do you help them to see fundraising as a noble pursuit?

Begin by helping all staff and volunteers of your organization recognize they have a vested interest in development.

The connection between donors and mission is crystal clear.

- Without donors, you can't do your meaningful work.
- Without you, donors can't be the change they want to see in the world.

Your donor takes care of you; you take care of your donor. Philanthropy is symbiotic. It's a noble mission to facilitate philanthropy, and one of which to be very proud. It's a mission almost anyone would want to embrace — once they understand [the true meaning of philanthropy](#). Love of humankind. Your donors are humankind.

When everyone becomes a philanthropy facilitator, something amazing begins to happen.

Since everyone's doing it, it begins to feel more natural. People begin to share stories with one another. Folks begin to take pride in asking, knowing they are offering people who share the same values the opportunity to partner with you to endorse their own values. Asking viewed in this way begins to seem like a noble pursuit, rather than a sleazy one.

Rather than asking only what your supporters can do for you, what about asking what you can do for them?

Part of your job is to help them experience the joy of giving. It is through you they will achieve their most meaningful work. Heck, while you're at it, what about asking what you can do for other staff on your team? Your entire team, not just your department.

Do unto others as you would have them do unto you. If your donors or team members are sending love your way, it's incumbent on you to send love back their way.



About the Author



Claire Axelrad, J.D., CFRE, is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP “Outstanding Fundraising Professional of the Year” award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

Claire also serves as [Bloomerang’s](#) Fundraising Coach. In that role, she provides regular advice and guidance exclusively to the Bloomerang [blog](#) and [webinar](#) series.

[Find out more >](#)

About Bloomerang

We believe in the value of life with a mission, and we applaud the choices nonprofit organizations make to improve the world.

We exist because they exist. We take great pleasure in creating tools and teaching principles that help passionate nonprofit organizations make smart decisions that are proven to help them reach out, grow and thrive.

Our Strategic Vision: to be the world's best developer and deliverer of tools and perspectives that generate value for nonprofit donor relationships.

Our Core Purpose: to improve donor retention in the nonprofit world.

At [Bloomerang](#), we're helping nonprofits become more successful at increasing revenue. Our user-friendly software is designed to help organizations naturally boost donor engagement, fundraising and retention through best practices and a user-friendly donor database interface.

Take a look at why [Bloomerang](#) has been rated "The Best Donor Management Software" based on user feedback. Explore a demo of our software here.

[Visit our website for a video demo >](#)



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