Life & Legacy

ASSURE JEWISH TOMORROWS

Sustaining Your Legacy Program

1. Introduction
2. Board of Directors
3. Legacy Committee
4. Prospects
5. Conversations and Formalization
6. Marketing
7. Effective Stewardship
8. Culture of Philanthropy
9. Conclusion

1. Introduction

The Harold Grinspoon Foundation (HGF) runs creative programs to engage the Jewish community by meeting people where they are at key life moments and by providing access to the best of Jewish culture and tradition, while using philanthropy to encourage others to invest in the Jewish community.

LIFE & LEGACY® was established by HGF to motivate Jewish organizations to secure after-lifetime commitments from their most loyal donors in order to build endowments that will sustain valued organizations and vibrant Jewish communities for the next generation and beyond.

Our top goals and priorities are:

- To change the philanthropic culture of a community so that legacy giving becomes the norm
- To assist organizations in incorporating legacy giving and strong stewardship practices into their culture
- To develop a camaraderie and respect amongst Jewish organizations while sharing the goal of legacy building for the entire community
- To provide all donors with the opportunity to be a philanthropist – to do something significant for valued organizations that they might never have thought possible

Essential to any non-profit's long-term financial stability strategy, a permanent endowment fund provides an annual distribution into an operating fund and/or funds specific activities. It also provides an organization with the ability to be financially flexible and adaptable as societal and communal needs change over time.

One goal of LIFE & LEGACY is to build organizational endowments through after-lifetime giving. While funding and training is provided for the first four years, it is the intent that your organization will continue to secure new legacy commitments and steward donors each year, forever.

Through these efforts, you will continue along the road of changing your fundraising culture to one that is based on relationships and that honors the partnership between donor and organization.

This plan is intended to serve as a guide for sustaining your legacy initiative in perpetuity.

2. Board of Directors

The ongoing support of your Board of Directors is critical to your legacy program.

Given most organizational board's focus on annual fundraising it's important that your board repeatedly be reminded of the equal importance of endowment building. This is so critical that financial advisors state that by the year 2030 a nonprofit should have 20% of its operating funds coming from a permanent endowment fund or they will be in financial crisis.

The commitment of your Board of Directors to integrating legacy giving into the activities and culture of your organization is pivotal to sustaining these efforts and creating long term financial stability.

To craft your Board Engagement Plan, consider these issues:

- How are you integrating legacy giving into your ongoing development efforts?
- Has your legacy team evolved into a standing committee of the board? If not, what steps are necessary to make it so?
- Is there an appropriate succession plan in place for the legacy committee? Who will serve as the chair of the committee and who will represent your legacy effort on the board?
- What is the expectation of board members when it comes to legacy giving?
  - Is there an expectation that all board members will engage in a legacy conversation?
  - Is there an expectation that all board members will make a legacy commitment sometime during their board tenure?
  - Who will train and educate new board members about the critical nature of legacy gifts?
  - Who will have a personal conversation with each board member?
  - How will you honor board members when legacy gifts are realized?
- What will be the legacy content at board meetings?
  - Will you report progress towards annual legacy goals monthly or quarterly? Which measurements of success will you highlight: legacy conversations, legacy commitments, realized gifts?
  - How will you share the impact of realized gifts and other impacts resulting from your legacy initiative?
  - Will you share investment results and expenditures of endowment funds on a quarterly basis?
  - Will you allocate board time for ongoing training/education on: importance of endowments, stewardship, legacy giving vehicles, moving towards a culture of philanthropy?
  - How will you share donor stories with board members?
  - How often will you include a list of legacy donors in board meeting materials?
- What steps need to take place in order for the board to approve a:
  - Gift Acceptance policy
  - Endowment Spending / Investment policy

- What types of on-going training and discussion is needed to continue to move your organization from a fundraising culture to a culture of philanthropy?
    - Board discussion centered on the Legacy Donor Bill of Rights* – as an organization, how do you currently treat donors? What changes, if any, do you need to make to more closely align with the Legacy Donor Bill of Rights?
    - Use "14 Questions for Board Members"*, present one question each board meeting for discussion
    - Board discussion centered on your culture of philanthropy – use the Haas Culture of Philanthropy chart and/or Simone P. Joyaux's paper on building a culture of philanthropy*. Discuss where you are currently, set priorities and develop strategies in areas that need to evolve.

* Documents found in back

Culture of Philanthropy Tip:

Board members serve as philanthropic ambassadors, make legacy commitments, cultivate relationships on behalf of and in support of the organization and help identify and cultivate prospective donors.

Board Engagement Plan	Tasks	Person Responsible	Timeline
Steps to make legacy team a committee of the board			
Succession plan for Committee members			
Expectations of board members regarding legacy giving			
Legacy content at board meetings			
Steps to put policies and procedures in place that support legacy giving and endowment building			
Plans for ongoing training and discussion re: moving to a culture of philanthropy			

3. Legacy Committee

Continually motivating and inspiring others to work to ensure the future of your organization is vital to your sustainability. Legacy conversations focused on securing new gifts and formalizing commitments must be ongoing and part of your organization's development efforts. Therefore, the legacy committee needs to understand they are a valued part of your leadership and ongoing fundraising efforts. **Keeping them motivated is critical.** In addition to your legacy committee members, you may want to engage other volunteers (legacy champions) to speak with prospects about legacy giving.

To craft your plan for your legacy committee and champions, consider these items:

- What are the roles and responsibilities of each legacy committee member (conversations, marketing, stewardship, formalization)?
  - Will these be written?
  - How will they be shared with potential team members?
  - How will the team be accountable to each other?
- Legacy committee meetings
  - How often? Who will convene?
  - What will the agenda be?
  - What is the plan for ongoing education/training?
  - How will you use impact stories and testimonials to motivate and inspire committee?
  - How will you make the meetings enjoyable?
  - How will you celebrate success?
- What is your process for identifying, recruiting and training new members and/or volunteers?
- How will you educate those involved in development, at any level, to include and promote legacy giving?
  - Annual campaign
  - Event committees
  - Specialty campaign committee
  - Capital campaign committee
- How and when will you set annual goals for number of new conversations, new commitments to be secured and gifts to be formalized? **Make them ambitious but achievable.** Remember, the ultimate goal is to secure the future of your organization.
- Develop a system for keeping legacy committee members accountable to each other in order to achieve goals.

Culture of Philanthropy Tip:

Culture is the most important factor in determining an organization's effectiveness. Value each individual legacy committee member for the impact they have on sustaining your future.

SUSTAINABILITY PLAN

Legacy Committee Plan	Tasks	Person Responsible	Timeline
Roles and responsibilities of legacy committee members			
Legacy committee meetings (agenda, frequency, purpose, etc.)			
Recruitment of new legacy committee members/legacy champions			
Training of new legacy committee members/champions			
Annual goals: **New commitments** **Formalizations**			

4. Prospects

Seventy percent (70%) of legacy gifts are made because someone was **asked** to make a gift. Continually identifying your best prospects ensures that you will grow your list of legacy donors and continue to create a pipeline of gifts to fund your permanent endowment.

Develop a strategy for identifying and cultivating new prospects:

- Identify BEST current prospects:
  - **Longtime loyal (5 years or more):** members, staff, volunteers, donors at any giving level
  - Those who have been deeply affected by the work of your organization
- Develop strategies for cultivating new prospects:
  - Are there committees or volunteer activities that would further engage a potential new legacy donor?
  - Are there events or programs you should personally invite potential legacy donors to?
  - Is there someone in leadership who knows a particular donor who could serve as a connector?
- Consider establishing a group for longtime members or annual donors you can cultivate and steward to become legacy donors (for example Chai Society or Silver Circle.)
  - How will you further engage them through communication?
  - How will you integrate the concept of legacy giving into communications? (testimonials, listings, ways to give, information about the Legacy Society)
  - In what ways can you bring them together to increase engagement?

Culture of Philanthropy Tip:

Donors are accepted and celebrated for their legacy commitment, no matter the type or size of their gift, and valued for their skills, talents, and time. It's all about the relationships.

SUSTAINABILITY PLAN

Prospects Plan	Tasks	Person Responsible	Timeline
Identify best current prospects and priorities			
Cultivation strategies for new legacy prospects			

5. Conversations and Formalization

Be sure that you have the right person asking for the right type of gift at the right time.

Having a donor-centric conversation which focuses on the prospect's connection to the organization and their core philanthropic values is the best way to secure legacy commitments. Once a prospect has shared their emotional connection to the organization, you can comfortably invite them to join you in making a legacy commitment.

Studies show that donors who make legacy commitments are more likely to continue their annual support and tend to increase their annual giving over time. Therefore, we recommend you consider blending/integrating a legacy ask when you approach donors for annual, capital and/or cash endowment support.

Formalization conversations are a great opportunity to thank the donor for their legacy commitment and discuss what they would like to accomplish with their gift. This will allow them to consider what is a meaningful gift and the best giving vehicle for their circumstances.

Design a plan for securing new legacy commitments:

- Set a goal for the number of new commitments you want to secure each year.
- Decide who is the best person to have the legacy conversation with each prospective donor.
- Decide how to track your progress.
- Decide how you will hold each other accountable for completing assignments.
- Consider how best to integrate legacy giving into your other fundraising efforts.

Design a plan for formalizing legacy commitments:

- What steps will you take to encourage formalization?
    - Share testimonials that mention the vehicle for the gift.
    - Schedule events or programs which inform donors of the variety of ways to legally formalize their commitment.
    - Print ads or articles which provide information on different giving vehicles.
    - Mail out formalization materials to donors before having the formalization conversation.
- What is the plan for personal follow-up with donors?
    - Who will contact each donor and when is the best time to inquire if they have had a chance to formalize and offer to assist them in doing so?
    - How will you hold each other accountable for assignments?

Culture of Philanthropy Tip:

Ensure that conversations are always donor-centric and allow the donor to speak about why the work of your organization is important to them; discover their emotional connection to the organization.

SUSTAINABILITY PLAN

Conversation and Formalization Plan	Tasks	Person Responsible	Timeline
New Conversation **Assignments** **Tracking** **Accountability**			
Formalization: **Steps to encourage**			
Formalization: **Assignments** **Tracking** **Accountability**			

6. Marketing

Marketing to encourage legacy gifts is like Israel's drip irrigation system…drip by drip the donor sees the message and when the time is right, they make the commitment. Perpetually marketing legacy giving to your constituents will normalize legacy giving and offers donors another common way to have an impact. To make these efforts sustainable, it is important to integrate the concept of legacy giving into all fundraising materials and events.

To craft your Marketing Plan, consider these methods:

- Communication Devices
  - Facility – posters, banners, flyers, table tops, donor listing or wall, brochure…
  - Meetings / Events – announcements, materials, name tags…
  - Electronic – Display boards, website, social media, email, e-blasts…
  - Mailings – pledge reminders, year-end tax statements, stationery, direct mail letters…
  - Newsletter – ad, donor testimonial/story, listing, topical article, photos…
- Organization calendar
  - Large Events – event booklet, poster, announcements, ribbons, tent cards, brochure, ads
  - Holiday programming – announcements, flyers, ribbons, poster/banner…
  - Meetings/Classes – group presentation, announcements, brochure, banner, tent cards…
  - Shabbat Services – announcements, brochures, ribbons…
- Fundraising
  - Annual Fund letter – check box or ask them to contact if:
    - "I have already included (your organization) with a gift in my will, trust, retirement account, or life insurance policy"
    - "I'd like to be remembered forever, please contact me regarding a gift in my will, trust, retirement account or life insurance policy"
    - "I'd like to be remembered forever, please contact me to discuss a legacy gift"
  - High Holidays – Materials on seats or around facility, remarks from champion, bookmark, appeal cards with fold-down tab for legacy commitment.
  - Personal conversations – blended/integrated ask.
  - Events – brochures, flyers, tent cards, ask, ad in tribute book, announcement.

Remember to use donor listings, donor testimonials and impact stories to market legacy giving

Use the table to outline how your organization will continue to weave legacy giving into your marketing efforts

Culture of Philanthropy Tip:

Donors are contacted regularly with invitations to participate in activities, progress updates, and information about how their annual contributions are making a difference and the impact their legacy gifts will have.

SUSTAINABILITY PLAN

Visuals in the Facility	Events / Meetings	Electronic	Mailings	Newsletter

7. Effective Stewardship

Effective stewardship will allow your donors to feel valued and appreciated, will keep them engaged and reminds them they made a good investment.

When an organization excels in all aspects of stewardship, individuals and families will be inspired to belong, to donate, serve as volunteers, engage, and attend events/programs/meetings. Your ability to integrate stewardship into your organizational calendar will enhance feelings of generosity and abundance.

Stewardship of your legacy donors is as important as having the conversation. Without long-term, effective stewardship, donors may decide to alter their legacy commitment. Therefore, it is important that you develop an effective stewardship plan that can be implemented in perpetuity.

Create a plan with at least 4 stewardship activities per year, a minimum of one in each of these areas:

- CARE – personal connections and sharing impact
- SHARE – listing donors and sharing testimonials
- HONOR – publicly recognizing your donors among your own community
- INVITE – hosting an event specifically for legacy donors

Remember, the more times donors hear from you in appreciation and gratitude, the greater the connection they will feel.

Also consider these aspects of stewardship as you build on what you already have in place:

- How have you implemented excellent **administrative practices**?
  - How are you tracking donor information and individual stewardship?
  - How are you keeping information gleaned through donor conversations?
  - How will you ensure you are responsive to donor questions and issues?
  - Do all staff members understand how to appropriately treat donors?
- Are you **financially stable and fiscally responsible**?
  - Is your budget balanced?
  - Are you transparent with your budget and finances?
  - Do you have policies and procedures that support fundraising and the management/use of endowment funds?
  - Do you regularly **share the impact of your programs and services** with your donors?
- How will you work to **further engage legacy donors** in the work of your organization?
  - Serve on committees.
  - Host events.
  - Be legacy ambassadors.
  - Provide information on the impact annual gifts and endowment funds are having in the community and/or organization.

- Will you create and implement any individual **stewardship plans** which seek to deepen the relationship between the donor and the organization?
    - Choose 2-5 donors per year.
    - Consider what you know about them and how you can build stewardship that is targeted toward what each one cares about.
- What are your plans for the continuation/establishment of your **legacy society**?
    - How will you market your "society" to encourage more members?
    - How will you continue to show appreciation and gratitude to your members throughout the year?
- How will you be ensure you honor donor intent of realized legacy gifts?

Culture of Philanthropy Tip:

Donors feel appreciated, recognized and included as partners in the organization's work and its success. Stewardship efforts extend to donors at all levels of contribution as well as volunteers.

SUSTAINABILITY PLAN

Stewardship Plan	Tasks	Person Responsible	Timeline
CARE: **Personal Connection**			
SHARE: **Donor listings** **Testimonials**			
HONOR: **Acknowledge among your organizational community**			
INVITE: **Events specifically for legacy donors**			

SUSTAINABILITY PLAN

Stewardship Plan	Tasks	Person Responsible	Timeline
Administrative			
Financial stability and fiscal responsibility			
Share impact of programs and services			
Further engagement of legacy donors			
Individual stewardship plans			
Legacy Society			

8. Culture of Philanthropy

When philanthropy and fundraising are inextricably entwined and belong to the entire organization, all departments, each person and all volunteers, you will have achieved a culture of philanthropy. Having a strong culture of philanthropy will allow your organization to be successful and effective. This culture strengthens when the organization (its marketing, language and deeds) is donor-centric, provides opportunities for engagement, and regularly shares the impact of programs and services. Achieving a strong culture of philanthropy will allow every donor/member/volunteer/staff-person to feel knowledgeable and proud of their impact so they are enthusiastic about asking others for support.

Consider your organization regarding these cultural markers:

- Legacy giving is a priority and **shared responsibility of board and staff.**
- There is **gratitude and deep appreciation** for leaders, colleagues, volunteers, and donors.
- **Staff and board are enthusiastic about asking for support** because of the mission of the organization and the impact on members of the community.
- Everyone accepts and **celebrates your donors** and their commitment, **no matter the type or size of the gift**, recognizing that donors are integral to the impact of the mission.
- Everyone on your **staff and board is an ambassador** for the organization – this includes **doing their "job" well**, understanding how all the various jobs in an organization create one integrated system and treating all customers/members/constituents and one another with **care and respect.**
- **Everyone can tell the story** (case for giving) of the organization.

Continue your transition from a fundraising culture to a culture of philanthropy by:

1. **Evaluate your <u>current</u> culture.** Here are some useful tools:
    a. Culture of Philanthropy Chart from the Haas Study*
    b. Cultural markers as outlined by Simone P. Joyaux*
2. Discuss **the kind of culture you want** your organization to be known for.
3. **Create strategies** to transition to a stronger culture of philanthropy.

Consider setting 3 goals to transition your organization to a culture of philanthropy.

Culture of Philanthropy Tip:

Everyone in the organization shares some responsibility for revenue generation by serving as ambassadors and building relationships with potential donors and constituents.

SUSTAINABILITY PLAN

Culture of Philanthropy	Action steps to improve	Person Responsible	Timeline
Goal #1			
Goal #2			
Goal #3			

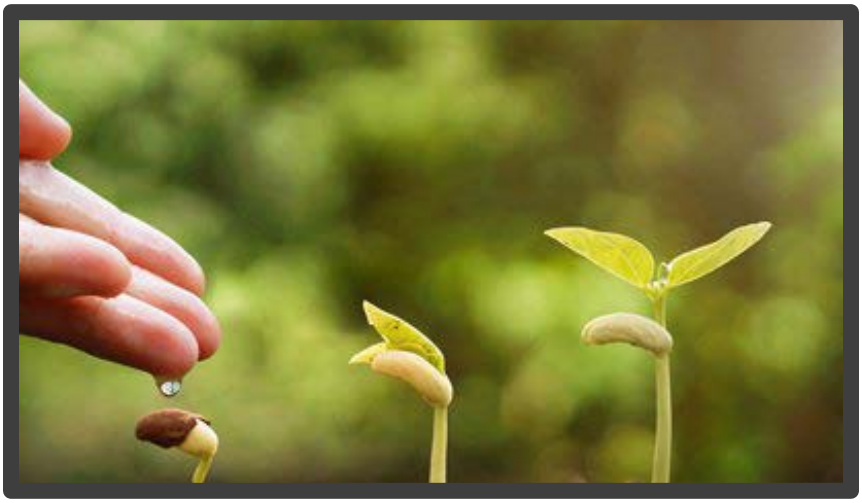
9. Conclusion

It has been the Harold Grinspoon Foundation's honor and privilege to work with you, your legacy team and your community. You have made significant strides in integrating legacy giving into your individual organizations and your community.

You should feel proud of all you have accomplished, but at the same time understand that just because HGF's training and incentive grant funding are coming to an end, this does not signify the end of your legacy initiative, in fact you are just getting started.

Culture changes are never easy and take time. We salute you for the amazing progress you have made so far and look forward to watching your legacy commitments and formalized gifts continue to increase and your endowment grow as legacy gifts are realized.

May you continue to go from strength to strength!



"Don't judge each day by the harvest you reap but by the SEEDS you plant"

-- Robert Louis Stevenson

LIFE & LEGACY
Assuring JEWISH TOMORROWS
A program of the HAROLD GRINSPOON FOUNDATION

THE LEGACY DONOR's BILL OF RIGHTS

Legacy giving is based on voluntary action for the common good. It is a tradition of giving and sharing that is of extreme value to the North American Jewish Community. To assure that legacy giving merits the respect and trust of our most loyal donors and that they have full confidence in our organization and our ability to carry out our mission, we declare that all legacy donors have these rights:

1. To be informed of our mission, how we use after-lifetime gifts and our capacity to use these gifts for their intended purpose.
2. To feel free to ask questions when making a legacy commitment and to receive prompt and truthful and forthright answers.
3. To be informed of the identity of those serving on our board of directors and staff, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
4. To have access to our most recent financial statements.
5. To be assured their gifts will be used for the purpose for which it was given.
6. To receive appropriate acknowledgement, recognition and stewardship over the course of their lifetime.
7. To be kept informed of our organization's activities and the impact we are having on those we serve.
8. To be assured that information about their legacy commitment is handled with respect and with confidentiality to the extent provided by laws.
9. To expect that all relationships with individuals representing our organization will be professional in nature.
10. To have the opportunity to give anonymously if they so wish.
11. To have the opportunity for their names to be deleted from mailing lists that we may intend to share with others

Based on the Donor Bill of Rights – Intentional Stewardship by Julie S. Emlen
LIFE & LEGACY, 2019

LIFE & LEGACY
Assuring JEWISH TOMORROWS
A program of the HAROLD GRINSPOON FOUNDATION

14 QUESTIONS for BOARD MEMBERS

These questions are designed for Board Members of organizations that participate in the LIFE & LEGACY initiative. It's our recommendation that your President, development staff or a legacy team member ***present one question each meeting*** *for discussion as a way of transitioning your organization from a fundraising culture to a culture of philanthropy.*

UNDERSTANDING ENDOWMENT

1. Review your current sources of income and then discuss: How would an endowment help support the long term financial stability of our organization?

2. What might we do differently if we had 20% of our operating budget coming from our endowment fund each year?

3. What can this board do to further build our endowment? (Have we made our personal gifts? Have we acted as ambassadors for this initiative? Have we held conversations with others to make their gifts?)

DONOR RELATIONS and CULTIVATION

1. How do we define who is a loyal donor/member/congregant and how do we show our appreciation to these individuals?

2. In what ways is our organization dependent on the generosity of our donors?

3. How can we best support our donors making the greatest possible impact they desire on our organization?

STEWARDSHIP

1. How does our organization treat our donors? Consider these 4 areas:
    a. Communication (How do we communicate with donors? How often? What are the various messages we convey in these communications? Do we remind them of the impact they are helping us have? Do we consider our 'members' also 'donors'?)

b. Appreciation and Recognition (How do we say thank you? In what ways? How often? How do our donors feel about how we steward them?)

c. Technology (How do we use it to keep clean records, and to interact and increase engagement with our donors?)

d. Back Office (How do our invoices, statements, data collection and recordkeeping reflect our partnership w/our donors? How do we communicate financial responsibility and transparency? ie., how does a donor know we are spending their money in the way they hope and intend?)

LEADERSHIP

1. As a board member, you are demonstrating commitment to and leadership of this organization. This carries both honor and responsibility. What impact do you desire to make as a leader in our organization?

2. An after-lifetime designation to a charitable organization is the final gift a person can give to an organization that has had an important impact on their lives and/or the lives of others. What kind of impact would you like to have on our organization? What needs to happen for you to achieve this impact?

SUSTAINABILITY

1. How can we integrate the LIFE & LEGACY message with our existing fund-raising efforts?

2. We need to ensure that we continue to offer every donor the chance to make an after-lifetime gift to our endowment. What steps need to be taken to make the legacy committee a committee of the board – either a stand-alone committee or part of a development or endowment committee? How do we ensure succession of the leader of this effort?

JOYAUX ASSOCIATES © Simone P. Joyaux, ACFRE • Rhode Island USA • spjoyaux@aol.com

BUILDING A CULTURE OF PHILANTHROPY IN YOUR ORGANIZATION

Not-for-profit organizations are different than for-profit organizations. And this difference is no more apparent than in the relationship of philanthropy to the not-for-profit.

Some people define *philanthropy* as *voluntary action for the common good.* Many talk about fund development as *the engine that drives philanthropy.* Without charitable giving, most not-for-profits cannot survive.

But too often, organizations do not fully understand the value of philanthropy and the importance of fund development. Many organizations isolate fund development in one corner of the organization. Other organizations value fund development but assign it to staff and/or a committee of the board.

Philanthropy and fund development -- inextricably entwined -- belong to the entire organization. Every individual. Every department. All volunteers.

For a not-for-profit organization to be truly successful and effective, the organization must develop a *culture of philanthropy.*

This means that everyone in the organization ... from the janitor to the president of the board ... understands that philanthropy and fund development are critical to organizational health AND that each individual (both the janitor and board president) has a role in the process.

First and foremost, everyone is an ambassador for the organization's service, and for philanthropy and fund development. Being an ambassador means doing one's own job well, understanding how all the various jobs in the organization create one integrated system, and -- most especially -- treating all of the organization's customers (clients, donors, volunteers, community people, etc.) with care and respect.

Everyone is an ambassador for philanthropy and fund development. If the quality of the program is not good enough, it doesn't matter what the fund raiser does. If board members don't talk enough about the organization with their friends and colleagues, it doesn't matter how hard the executive director tries to raise funds. If the receptionist isn't sufficiently helpful, the best direct mail solicitation will not be as effective as it can be.

This is the culture of philanthropy. An attitude. An understanding. A behavior. After the culture of philanthropy is firmly established, fund development is more effective.

Many organizations hire development staff or assign development to their executive director. All organizations should establish a board-level development committee.

But regardless of staff or committee, the board is ultimately responsible for the financial health of the institution. That means that the board is ultimately responsible for fund development.

The board's development committee is responsible to provide leadership, to institutionalize the process of development within the board. The staff provides leadership and information and support and lots of content.

But the best staff and the best committee engage each and every board member -- and other volunteers -- in the process of fund development.

Every board member is responsible to do the following:

Understand and promote the culture of philanthropy.
Serve as a philanthropic ambassador within the organization and community.
Give an annual contribution to the best of personal ability. When there are special campaigns, give an additional gift.
Cultivate relationships on behalf of and in support of the organization.
Help identify and cultivate prospective donors and fund-raising volunteers.
Participate in some fund-raising task every year.

Every staff member is responsible to do the following:

Understand and promote the culture of philanthropy.
Serve as a philanthropic ambassador within the organization and community.
Program staff (or any individuals with direct contact with clients and community) are expected to help cultivate relationships on behalf of and in support of the organization. This doesn't mean help fund raise. It means being sensitive to and aware of others, providing them with quality service, and paying attention to their interests.
Many staff are also expected to work with development staff to support grant applications and other development activities related to program.
(And, organizations should give their staff an opportunity to give a charitable contribution.)

Beyond Fundraising: What Does it Mean to Build a Culture of Philanthropy? By Cynthia M. Gibson – Evelyn & Walther HAAS Jr. Fund

In A Fundraising Culture...	In A Culture of Philanthropy...
Philanthropy = grants by institutions or gifts from wealthy individuals.	Philanthropy = love of mankind.
Development staff is responsible for revenue generation.	Everyone in the organization shares some responsibility for revenue generation by serving as ambassadors and building relationships with potential donors and constituents.
It's all about the money.	It's all about the relationships.
Donors = money.	Donors = skills, talents, time and money.
Donors are contacted only when money is needed.	Donors are contacted regularly with invitations to participate in activities, progress updates, and information about how their contributions are helping.
Fundraising and engagement are siloed and have different contact lists.	There is one list for every person who's affiliated with the organization in some way (e.g., volunteering, donating, organizing, etc.).
Fundraising is seen as a one-off or add-on.	Fundraising is incorporated into and across every staff position and activity in the organization.
Culture is seen as "touchy feely."	Culture is the most important factor in determining an organization's effectiveness.
The board relegates fundraising to the development committee.	The board development committee directs the participation of the entire board in fundraising.
It's about acquiring donors.	It's about keeping donors.
Mission, program goals and operations are separate from revenue generation.	Mission, program goals and operations are aligned with revenue generation.
The focus is on short-term tactics like appeals and events.	The focus is on the longer-term strategy behind the tactics.
The organization functions with a scarcity mindset.	The organization functions with a mindset of abundance.
The organization's leaders make decisions based on what's available.	The organization's leaders make decision based on what the community needs and a shared vision of how to meet that need.
The community isn't engaged.	The community is intentionally engaged and participates as a partner with the organization.
Development staff/directors are relegated to secondary status.	Development staff/directors are part of the leadership team and equal partners with other senior staff; they participate in all planning, strategy, financial and organizational meetings.
Development goals aren't part of everyone's job description.	Development goals are part of everyone's job description.
Board and staff have sporadic contact.	Board and staff have regular opportunities to engage and interact.
The focus is on big gifts.	All gifts are important.
Donations come first.	Donations come after we engage people in our work.
We will win over every donor for our organization.	We will listen and refer donors to other organizations that align more closely with their aspirations.
Money is dirty.	Money is what we need to do our work.
There are rigid lines between organizations' departments, including development.	Job responsibilities and departments are more fluid; more collaboration to meet goals.