

Agency Executive Committee Training

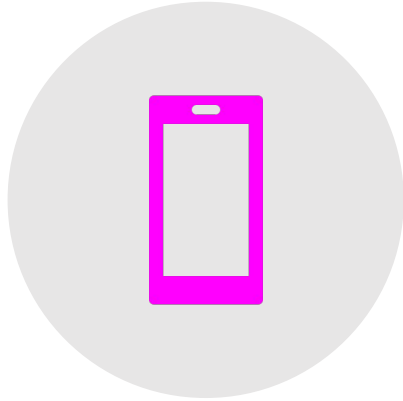
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Group Agreements



**PLEASE LIMIT
OUTSIDE
DISTRACTIONS**



**THERE ARE NO
STUPID QUESTIONS**



**STEP UP - STEP
BACK**

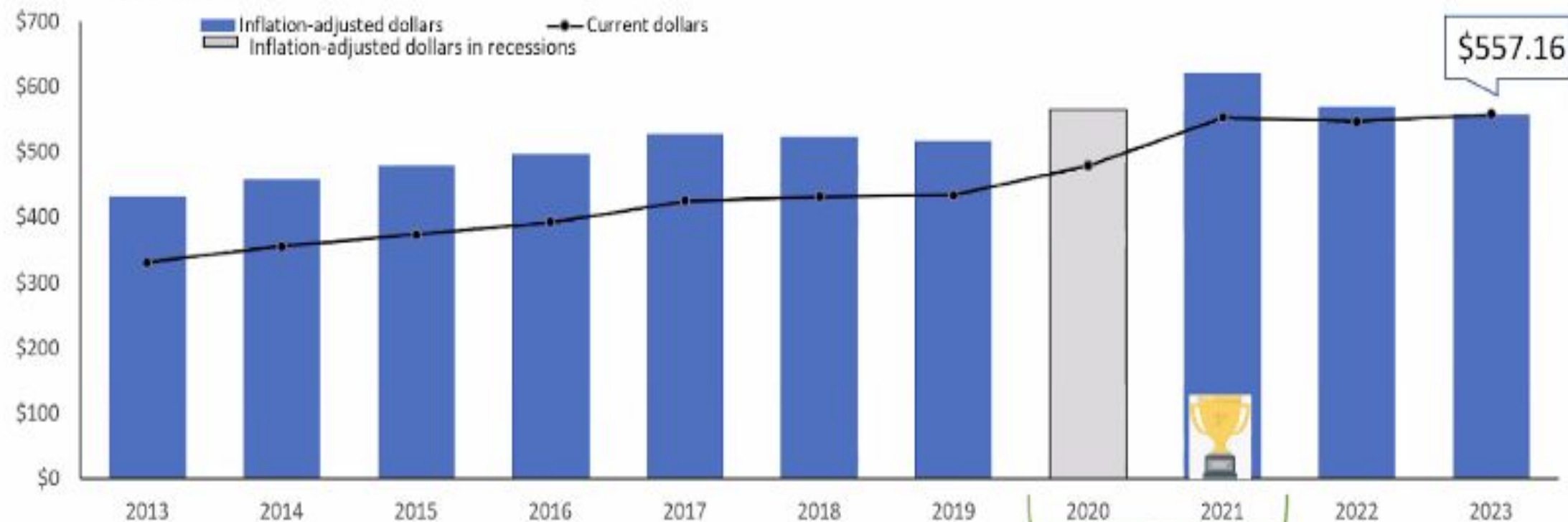
Introductions & Connection



Today's Discussion

- Offer/Ask
- The current philanthropic landscape
- Research-informed philanthropy: what works
- Board and staff roles for success
- Survey report
- Table Talk
- Thank you and goodbye

Total Giving: 1983-2023 (in billions of dollars)



* Numbers on chart display current dollars



Giving
USA[®]
A public service organization
of the giving community



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Global solutions
for the giving sector

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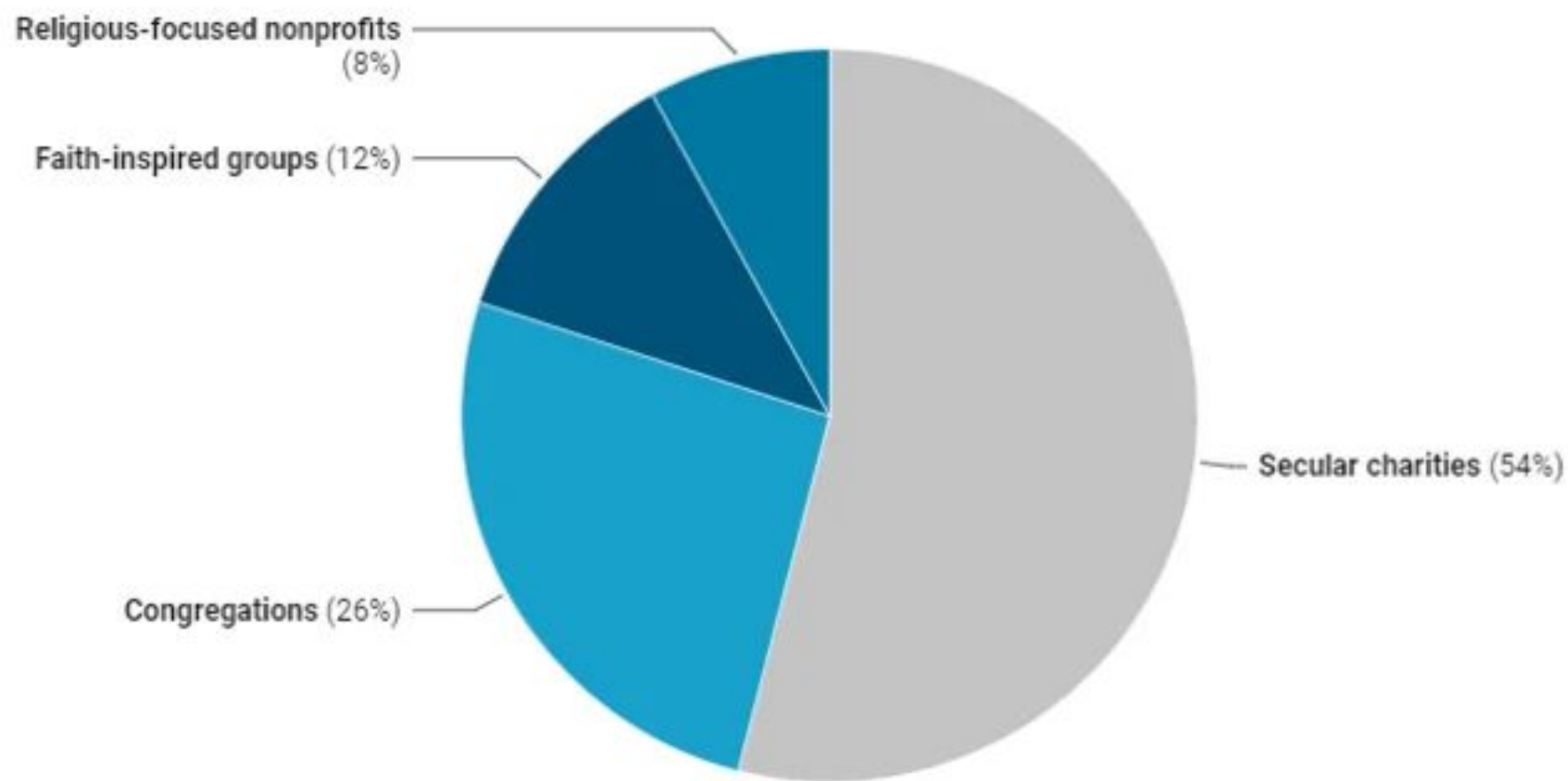


LILLY FAMILY SCHOOL OF PHILANTHROPY
INDIANA UNIVERSITY

Pandemic-era giving

Faith's Outsized Role in the Nonprofit World

Nearly half of the 1.45 million operating charities have at least some religious identity.



Source: Brad Fulton, Indiana University; Allison Ralph, Cohesion Strategy • [Get the data](#) • Created with [Datawrapper](#)

Insights

- **Giving to Human Services is up**
- **Religious giving is growing more slowly than other forms of giving**
- **DAF Giving is up 600%**
- **The % of households giving is down**
- **Public conversations about generosity are dominated by those who don't represent everyday givers**



Who wants to be a philanthropist?

A game show about giving

Roles in Philanthropy

The team works together to meet the development goals but each play different roles

Staff Leadership

- Conduct prospect & funder research, develop strategy
- Match donors to appropriate projects and priorities
- Lead development planning
- Manage logistics
- Provide information, coaching, and support for volunteers
- Facilitate back-office operations
- Solicit donations as appropriate
- Develop and manage collateral content
- Give

Board Members

- Share prospect insights and connections
- Use influence to open doors
- Educate and engage the community
- Recruit and motivate high-level volunteers
- Give at a personally significant level
- Steward donor relationships
- Participate in solicitations
- Deploy collateral and tools provided by staff
- Approve or adopt fundraising budgets

With regards to your involvement in fundraising, what is your comfort level with the following activities?

	VERY COMFORTABLE OR COMFORTABLE	POSSIBLY COMFORTABLE WITH HELP	UNCOMFORTABLE
Make my own personal contribution	99.83%	0	0
Share personal stories about my involvement with this organization	100%	0	0
Make phone calls to thank donors	90.32%	6.45%	3.23%
Speak publicly at outside events or gatherings	87.09%	12.90%	0
Help with fundraising events	90%	10%	0
Contact donors and invite them to meetings and events	83.88%	12.90%	3.23%
Serve on a fundraising committee	76.66%	10%	13.33%
Encourage others to give	77.42%	23.33%	10%
Attend solicitation meetings with donors	66.67%	19.35%	3.23%
Help identify prospects	63.33%	33.33%	3.33%

Table Talk

Reflection and discussion

**What support
do I need...**

**From staff?
From board?**



What is fundraising?

Your job is not to hit people up for money; it is to find what brings them joy.

Your job is not to strong arm people to attend events; your job is to invite them into experiences that have meaning.

Your job is not to pitch the organization or get a donation. Your job is to learn what motivates people - what change do they want to see in the world?

Your job is not to hijack other's contacts but to make opportunities for them to invite the people, with whom they share values, to experience those values in action

Resources

- Today's presentation
- Link to Giving USA graphic
- Link to DonateStock widget
- Link to DAF widget
- Link to post project feedback survey

<https://rosecityphilanthropy.com/jfgp-agency-committee-training/>



Rose City Philanthropy partners with nonprofit and government organizations to create enduring assets that transform lives, families, and communities. We combine decades of resource development expertise and forward-thinking fundraising practices as we work alongside our clients to create the change that they want to see in the world. Together, we'll build a community of believers, advance your mission, and find your greatest champions.

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