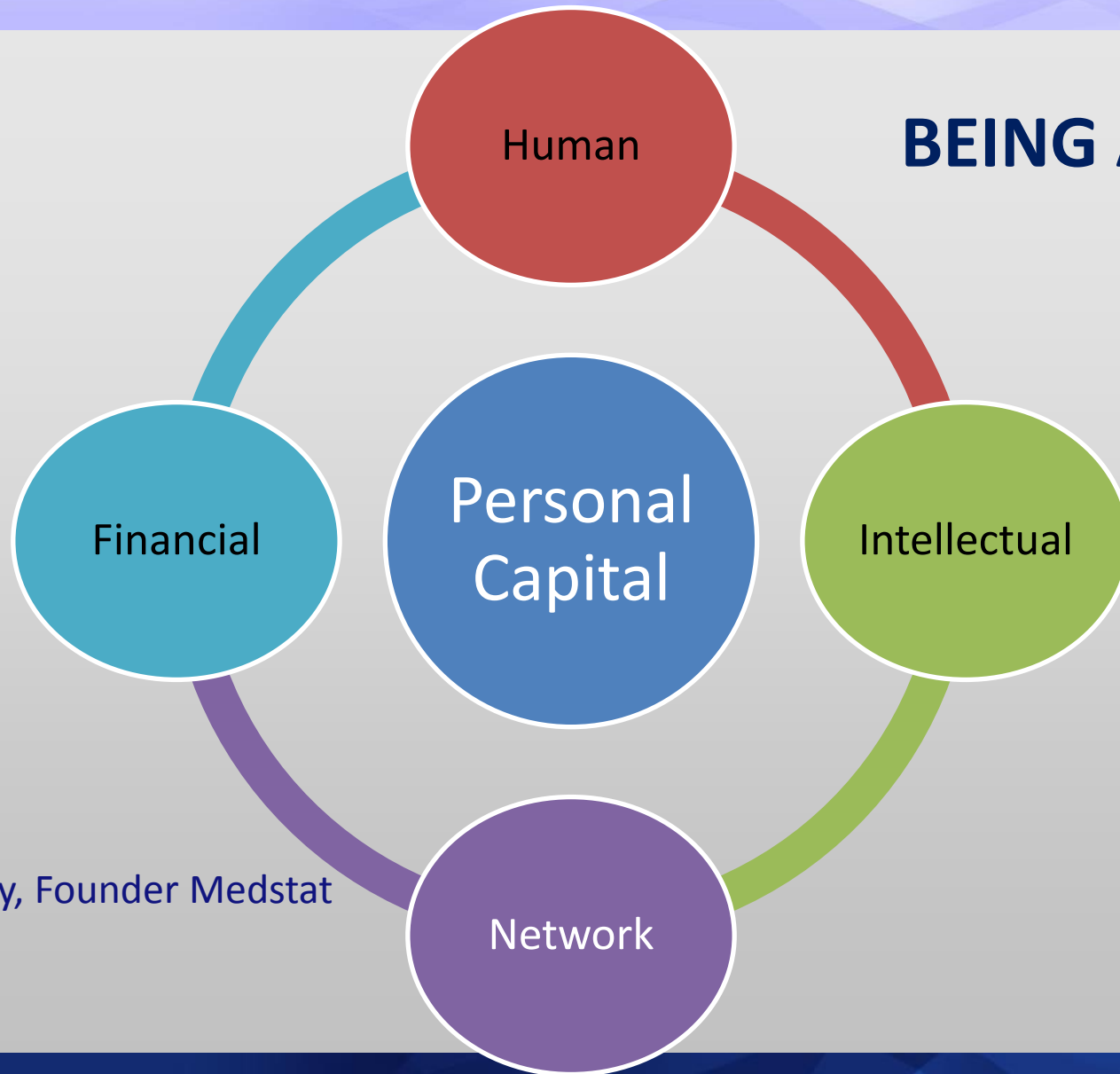


Creating a Culture of Philanthropy, Stewardship and Engagement

Inspired, Joyful, Generous Investments



BEING ALL IN



Ernie Ludy, Founder Medstat

For Life!



DEFINING OUR TERMS

Culture of Philanthropy

“Everyone understands, embraces, believes in, and acts on his or her collective and individual roles and responsibilities in philanthropy, stewardship and donor engagement in a collaborative and donor focused manner”*

*Karen Osborne, The Osborne Group, Inc.

A Word About Donor Focused

1. We know our donors well. We asked strategic questions and listened; we document
2. Upgrades and retention are our top donor fundraising goals – everyone is involved
3. Language matters
4. We care what they think, we engage productively and meaningfully
5. We are consistent, multi organizational relationships

Stewardship*

*The Osborne Group, Inc.

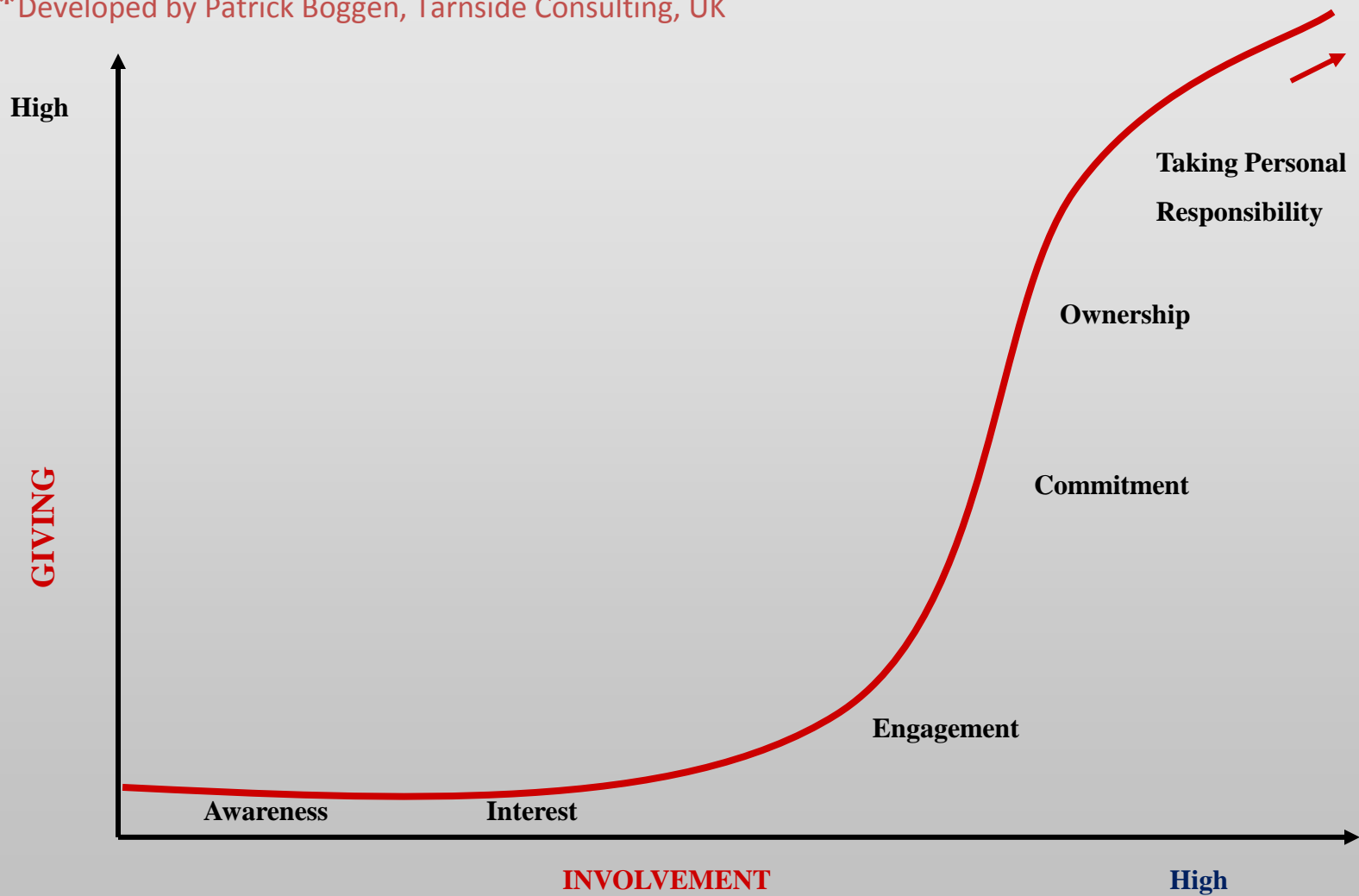
1. Accountability and transparency
2. Fiscal prudence and effectiveness
3. Documentation including donor motivation and intent, decision-makers and process
4. Thanking within 24 to 72
5. Recognition
6. Reporting, sharing impact and outcomes
7. Connecting donors to IMPACT in an experiential way

Making Donors Say, “WOW”



The Tarnside Curve of Involvement

*Developed by Patrick Boggen, Tarnside Consulting, UK



THE FIVE DEGREES OF PARTNERSHIP WORKING

- Co-existence

“You stay on your turf and I’ll stay on mine”

- Co-operation

“I’ll lend you a hand when my work is done”

- Co-ordination

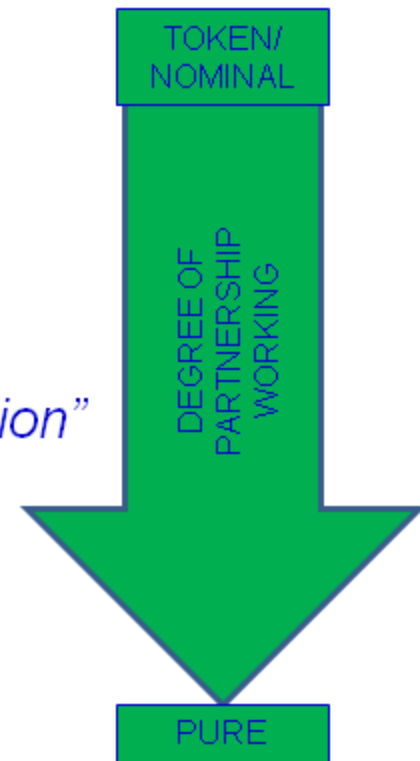
“We need to adjust what we do to avoid overlap and confusion”

- Collaboration

“Let’s all work on this together”

- Co-ownership

“We all feel totally responsible”.



What Would This Look Like?



BOARD MEMBERS

Inspired, Generous, Joyful Investment*

*Karen Osborne, The Osborne Group.

- Introducing
- Informed, passionate ambassador
- Hosting and attending
- Connecting and engaging others
- Soliciting
- Providing stewardship
- Taking personal responsibility* *Tarnside Curve of Involvement
- Developing and supporting a strategically composed and engaged board

Strategically Composed

Must Have	Very Important	Important Other
100%	40%-70%	1 or 2 Individuals

Strategically Engaged

Board Meetings

- Consent agenda
- 30/70 dialogue
- Meaningful and productive

Committee Meetings & Between Meetings

- Chair responsibilities
- Personalized
- Meaningful and productive

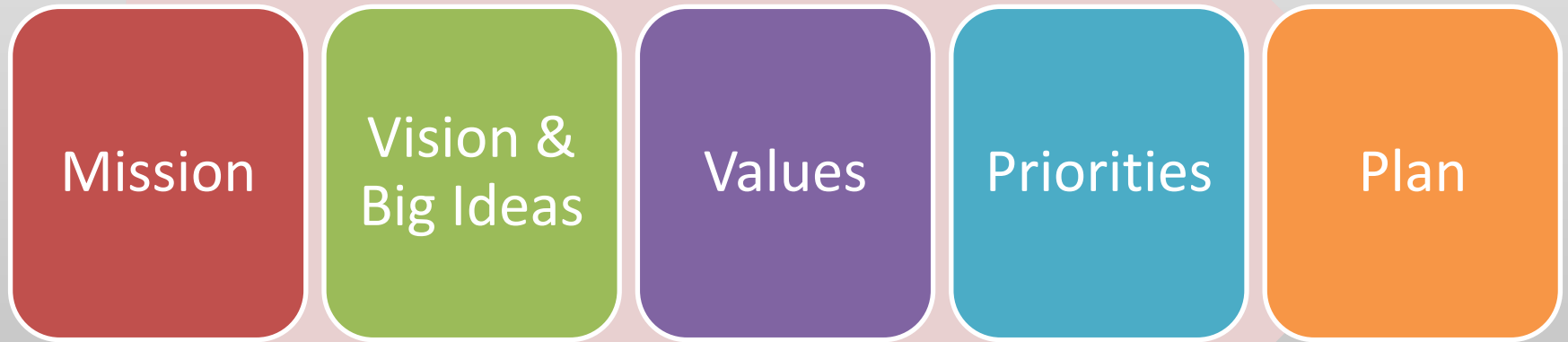


Believing and Investing in Fund Development

- Generous, inspired, joyful givers – leadership annual, major (those with capacity) and bequest
- Champions for office investments – staff, infrastructure, tools
- Defenders, ambassadors
- Participants

STAFF

Building Blocks



CEO

1. Generous current donor, legacy donor
2. Time (for donor strategy, visits, stewardship, top 50 donors)
3. Skills (learn, practice)
4. Make fueling the resource engine everyone's responsibility
5. Investing in fund development (adequately staffed, technology, infrastructure, tools)

Mission

Staff Engagement



- Stewardship
- Identification
- Generous donors, legacy
- Part of their responsibilities
- Visits
- Stories and reporting
- Ambassadors
- Trained

Everyone

- Customer service
- Story telling
- Passion
- Demonstrating the values
- Introductions and stewardship
- Pitching in as needed



How Close Are You?

5	We're practically perfect
4	Almost there
3	We have many elements and a plan
2	We have some elements
1	Not even close

THREE THINGS YOU COULD DO BEFORE THANKSGIVING

Three Steps to Take NOW!

Staff

1. Identify top donors from last three years, all current legacy donors
2. Create impact notes, highlights, stories, whatever you can do in the next two weeks
3. Assign a staff member or board member to each

Board

1. Make sure you have a personal story you can tell with passion and authenticity
2. Give generously; increase your gift this year
3. Take a top donor for coffee; share impact and outcomes

GOING FORWARD

Drivers of a Culture of Philanthropy

1. CEO leadership
2. Board leadership
3. Core revenue resource tied to vision
4. Relationship based, donor-centric, not transactional
5. Shared and well maintained data a must
6. There is a plan with clear metrics, review, reward



Assess and Plan

- Assess your culture of philanthropy
- Assess upgrades and retention rates
- Assess your stewardship program
- Assess your suite of engagement opportunities
- Make a level-up plan



Set SMART Goals Based on Aspirations



Specific

Measurable

Achievable

Results-oriented

Time-specific

Identify Activities and Tasks

1. Tasks to support each SMART goal
2. Due dates
3. Milestones
4. RASCI



Task and Project Management

- Who is responsible? R
- Who has final approval? A
- Who will provide support? S
- Who needs to be consulted? C
- Who needs to be informed? I

Tasks and Activities

**High Impact
Harder to Accomplish
(Part of the three year plan)**

**High Impact
Easy to Accomplish
(Part of the three year plan)
(Drives 2016 tactical plan)**

Lower Impact
Harder to Accomplish
(Drop)

Lower Impact
Easy to Accomplish
(Strengthen impact or drop)

METRICS AND RESULTS

Metrics and Results

- Higher donor retention
- More upgrades
- Increased donor satisfaction
- Viral marketing
- Increased bequests
- More annual donors becoming major and PG donors
- More bequests



Metrics and Results

- More inspired, joyful, generous yeses!
- More money to carry out your mission!



Your Takeaways?



“Culture Eats Strategy”

*Peter Drucker



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- Connect with us on LinkedIn Karen Osborne, Robert Osborne, Jr., Laurel McCombs

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