

Action Steps for Building A Culture of Philanthropy

- ☐ Provide learning opportunities so that everyone understands how philanthropy and fund development fit within your organization and the role it plays in mission achievement.
 - ✓ Educate all on how your organization is funded
 - ✓ Include in all staff and board orientations
 - ✓ Include in staff and board handbook
- ☐ Set clear role expectations
 - ✓ Discuss fund development responsibilities during board recruitment
 - ✓ Incorporate fund development responsibilities into all job descriptions
 - ✓ Identify specific ways that board, staff, and volunteers can support cultivation and engagement – help them understand the broad range of activities involved in cultivating and securing financial support
- ☐ Provide fund development training opportunities and tools needed for success
 - ✓ Incorporate training opportunities into board and staff meetings
 - ✓ Provide easy to use materials for your ambassadors – key messages, talking points
 - ✓ Take advantage of free training opportunities available - i.e. HFPG, HPL
- ☐ Communicate with your team (Board, Staff, and Volunteers)
 - ✓ Set fund development goals and objectives
 - ✓ Report back regularly
 - ✓ Include fund development on all meeting agendas – staff and board
- ☐ Make donor satisfaction an organization-wide priority
 - ✓ Set expectations for donor service – organization-wide
 - ✓ Regularly survey and/or interview donors
 - ✓ Involve everyone in the thank you process – handwritten notes and calls
 - ✓ Focus on ways to connect donors with the work of the organization – i.e. updates, calls, tours, volunteer opportunities
- ☐ Encourage collaboration and remove departmental silos (fund development vs. program)
 - ✓ Incorporate development responsibilities into all job descriptions
 - ✓ Incorporate development objectives into all department plans (not just development)
 - ✓ Include fund development as an agenda item at all staff meetings –needs, goals, results, and successes
 - ✓ Include development director as key player on leadership team
- ☐ Tell stories demonstrating impact
 - ✓ Mission moments at all board and staff meetings, programs, and events
 - ✓ Develop a story bank – ask all staff to contribute stories of impact that can be shared with donors
 - ✓ Share stories of donor impact in communication materials – how donor giving supports the work