Creating A Culture of Philanthropy: The Charitable Giving Governance Roundtable

- **Session 1: Reframing the Work of Fundraising**
  
  **Date:** June, 2013

  **Description:** Fundraising ultimately is about relationships. Creating a culture that supports sustained success in fundraising begins with an attitude that values and embraces the building of mutually-beneficial relationships. Once you build a community of believers, the money will follow.

  This session will give participants resources for reframing the work of fundraising as the work of building a broad network of like-minded people who find meaning giving their money, time, counsel, goodwill, and access to a larger network. Participants also will explore the role of - and potential for - fundraising in the context of their organization.

  At the conclusion of this session participants will:

  - understand fundraising in the context of their organization’s present culture,
  - define steps in creating a culture in which fundraising is viewed as a positive, shared function integral to the organization’s long-term viability,
  - develop a new, broader definition of fundraising that engages more board members and staff in the ‘new’ process of building mutually-beneficial relationships,
  - identify opportunities for board members, the CEO/Executive Director, and fundraising staff to begin developing mutually supportive relationships by increasing understanding of their respective fundraising roles, responsibilities, and expectations.
  - develop relationship-building strategies that lead to long-term success in securing levels of charitable giving needed to carry out its mission,
  - identify goals and measurable outcomes to help define success in fundraising and relationship building.

- **Session 2: Crafting Your Story (The Appeal)**
  
  **Date:** October, 2013

  **Description:** Storytelling plays a key role in defining organizational culture. Successful nonprofit organizations and their constituents have unique, compelling stories that share a common mission. These organizations create opportunities for telling – and listening to – stories as a way of making meaningful connections that inspire extraordinary results from their board members, staff, clients, volunteers, donors, and other partners.

  This interactive session will help participants begin to craft personal and organizational stories and learn strategies for using their stories – and the stories of their constituents – to build mutually beneficial relationships as the basis for long-term fundraising success.

  At the conclusion of this session participants will:

  - understand the role of storytelling in creating a culture that values relationship-based fundraising in the context of the organization’s long-term success,
  - learn how to craft personal and organizational stories that personify the organization’s values, goals, strategic vision for the future, needs,
  - identify practical ways of using stories to develop mutually-beneficial relationships,
  - learn how to engage key constituents by eliciting (listening to) their stories,
- develop practical ways of translating organizational and personal stories into effective fundraising strategies.

**Session 3: Planning to Succeed**

**Date:** January, 2014

**Description:** “Failing to plan is planning to fail.” The key to sustained fundraising success is a plan that includes a budget with income goals tied to the organization’s long-term strategic outcomes. *How* the plan is developed helps create a culture of philanthropy that esteems fundraising as, foremost, a relationship-building opportunity for engaging others in the work of securing the organization’s future.

In this session participants will learn and practice planning strategies that positively influence how the organization perceives and implements fundraising. Emphasis will be given to planning processes that integrate fundraising, program development, and strategic planning.

At the conclusion of this session participants will:
- understand the essential components of a basic fundraising plan, how they relate to each other, and how they support the organization’s programming/strategic plan.
- learn ways to engage multiple constituencies (especially board members and program staff) in the development and implementation of a fundraising strategy linked to the organization’s mission/vision, culture, program development, and financial needs.
- develop a template for a comprehensive fundraising plan that includes board/staff training, prospect identification, donor engagement/cultivation, solicitations, recognition, and bequest promotion [planned giving].
- begin to identify practical steps their organization can take to increase current levels of fundraising while building a base for longer-term fundraising success.

**Session 4: Engaging Your Board and Staff**

**Date:** April, 2014

**Description:** Your organization’s relationships are not a byproduct of its culture; they define the culture. Mutually beneficial relationships among key constituents help create a culture in which individual strengths can be leveraged to secure the charitable gifts needed by the organization to reach its full potential.

In this final session participants will begin to assess and then reframe their organization’s fundraising roles and responsibilities to create new opportunities for board members, staff, donors, and volunteers to participate in fundraising. Participants will learn and practice proven techniques for building relationships that can serve as a foundation for the organization’s long-term success in fundraising.

At the conclusion of this session participants will:
- understand basic roles and responsibilities for fundraising in their organization and how they are honored (fulfilled) impacts the organization’s fundraising culture.
• learn training strategies to help constituents fulfill their fundraising roles and responsibilities within an emerging culture that values and embraces the building of mutually beneficial relationships.
• learn how to complete a one-on-one interview to elicit stories from the organization's constituents while laying the foundation for a meaningful relationship.
• identify new/additional outcomes the organization will use to measure fundraising success.