

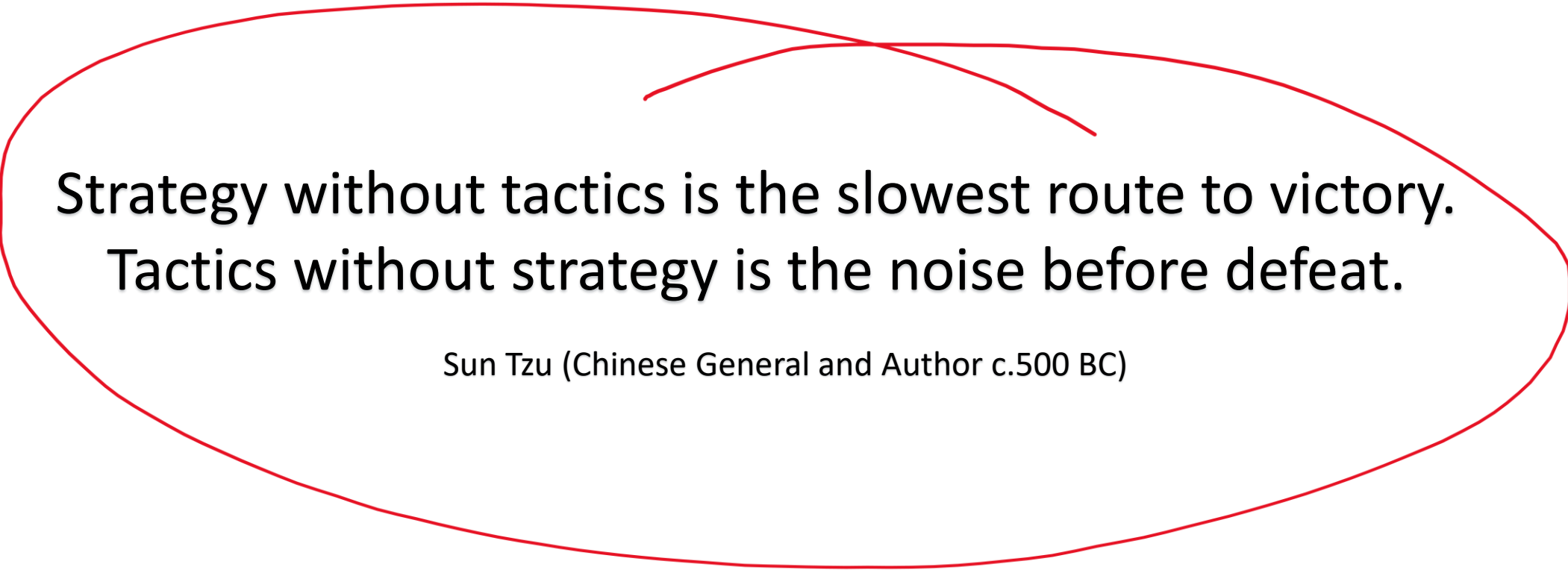
Philanthropy Symposium

Philanthropy Squared's Critical Success Factors
29 October 2024

philanthropy
squared.



STRATEGY VS TACTICS



Strategy without tactics is the slowest route to victory.
Tactics without strategy is the noise before defeat.

Sun Tzu (Chinese General and Author c.500 BC)

WHAT IS A CULTURE OF PHILANTHROPY?

- Most people in the organization (across positions) act as ambassadors and engage in relationship-building.
- Everyone promotes philanthropy and can articulate a case for giving.
- Fund development is viewed and valued as a mission aligned program of the organization.
- Organizational systems are established to support donors.
- The executive director is committed and personally involved in fundraising.

Bell, Jeanne and Marla Cornelius, **UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising** (San Francisco, CA: CompassPoint Nonprofit Services and the Evelyn and Walter Haas, Jr. Fund, 2013).

PHILANTHROPY SQUARED'S CRITICAL SUCCESS FACTORS

WHAT SUCCESSFUL PHILANTHROPIC FUNDRAISING PROGRAMS HAVE IN COMMON:



**TRANSFORMING AN ORGANISATION THAT FUNDRAISES
INTO
A FUNDRAISING ORGANISATION**

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1. VISION AND COMPELLING CASE FOR SUPPORT

A concise and compelling vision for philanthropic support that will enthuse and excite potential donors

- Translated from a convincing organisational strategy
- Informs the case for support
- Stress the IMPACT

NEED vs OPPORTUNITY



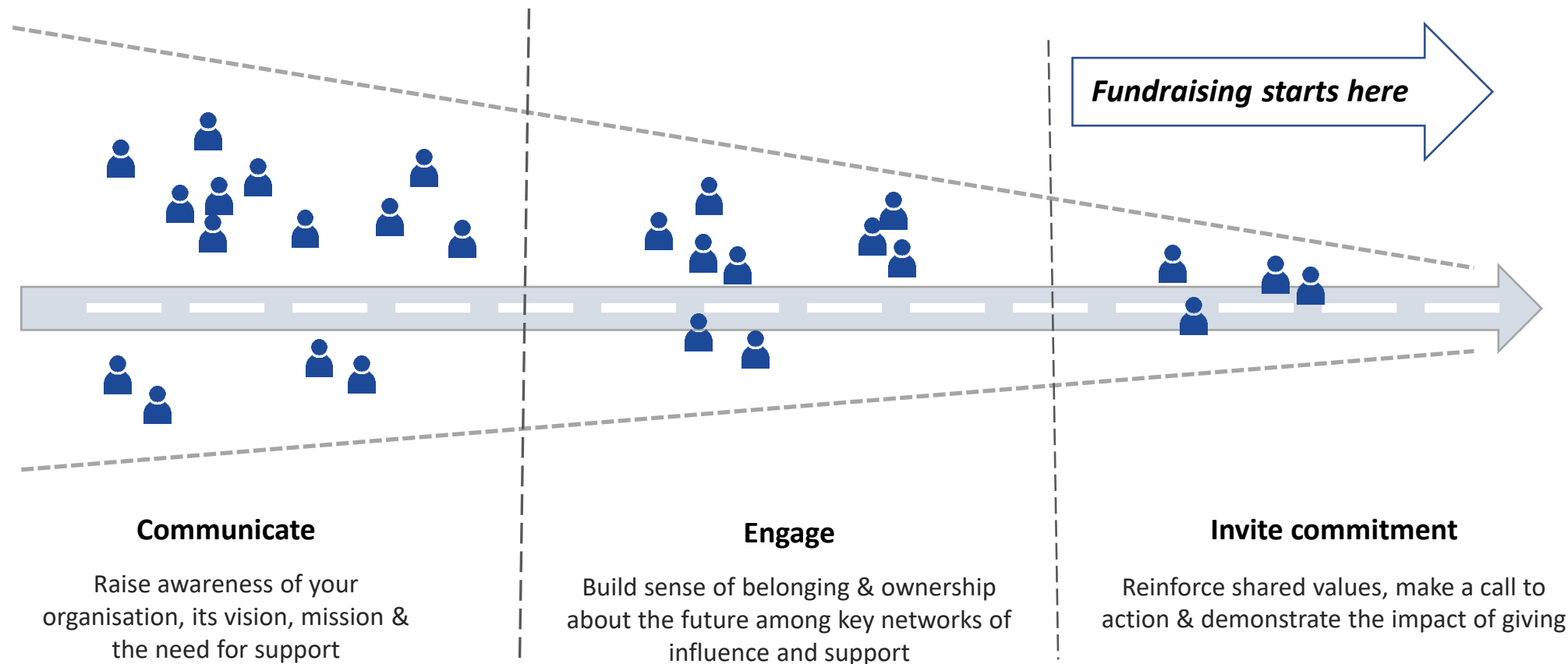
DONOR QUESTIONS

- ? Do I care about the cause?
- ? Do I have a compelling, driving belief that this organisation has the right focus?
- ? Is it well run, or will they squander my money?
- ? Who's involved that I know and/or respect?
- ? What, precisely, do they want money for?
- ? What difference will my gift make?

**MAKE
ME
CARE!**

THE DONOR JOURNEY

Fundraising cannot succeed in isolation. It relies on effective communications and engagement to create a pipeline of informed prospective donors.

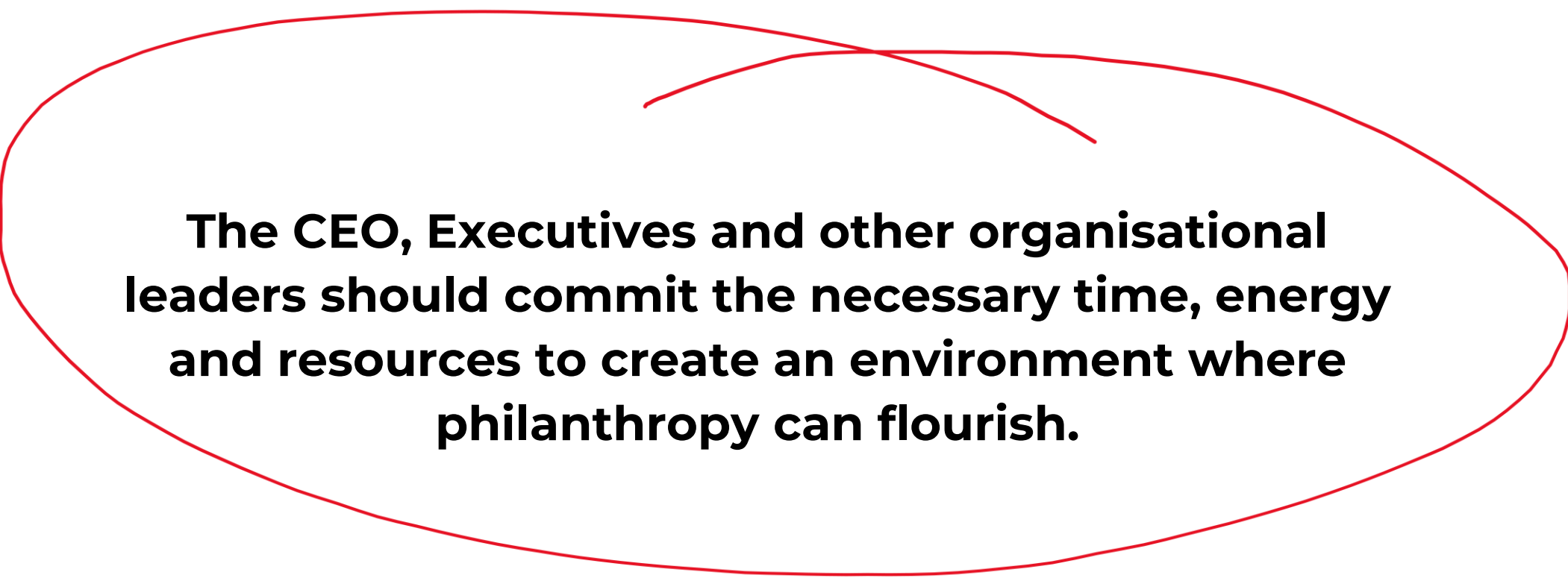


2. INTERNAL (EXECUTIVE) LEADERSHIP



Executive leadership capable of inspiring, responding to and managing change

- Set fundraising ambitions
- Ensure adequate resources
- Oversee implementation of fundraising strategy
- Interact credibly with internal and external constituencies
- Manage and motivate the board



The CEO, Executives and other organisational leaders should commit the necessary time, energy and resources to create an environment where philanthropy can flourish.

3. EXTERNAL LEADERSHIP

Board members and other advocates and ambassadors who provide external credibility and endorsement.

- Access to new networks
- Consolidation of existing networks
- Validate the cause to other constituencies
- Lead by example

ENGAGE – CARE -- GIVE



UNDERSTANDING LEADERSHIP ROLES

There are several sources of leadership, and cultivating donors is a team effort.

The executive will lead the process, but they will depend heavily on the Board to frame the vision and case for support.

Also, the Board will be critical in cultivating donors and making people feel part of the “family”.

ROLE	Board	CEO	F/raising
Formulation of vision and overall case for support	Major role	Major role	Major role
Maintain focus and commitment to supporting Philanthropy among staff		Major role	Subsidiary role
Managing the fundraising process			Major role
Identifying prospective donors/ intermediaries	Major role	Major role	Major role
Cultivation of key prospective donors - attending events, functions, meetings	Major role	Major role	Major role
Solicitation of key donors	Subsidiary role	Major role	Major role
Develop proposal(s) for prospective donors		Major role	Major role
Thanking donors	Subsidiary role	Major role	Major role
Donor stewardship - ongoing cultivation	Subsidiary role	Subsidiary role	Major role
Public face of philanthropy	Subsidiary role	Major role	Subsidiary role

- Major role
- Subsidiary role

4. SKILLS AND RESOURCES

INVEST TO RAISE. Dedicated staff, adequate budgets, disciplined data management to achieve maximum ROI.

- Chief Executive Officer as Chief Philanthropy Officer
- Fundraising staff
- Data & systems
- Targeted communications
- Events & admin

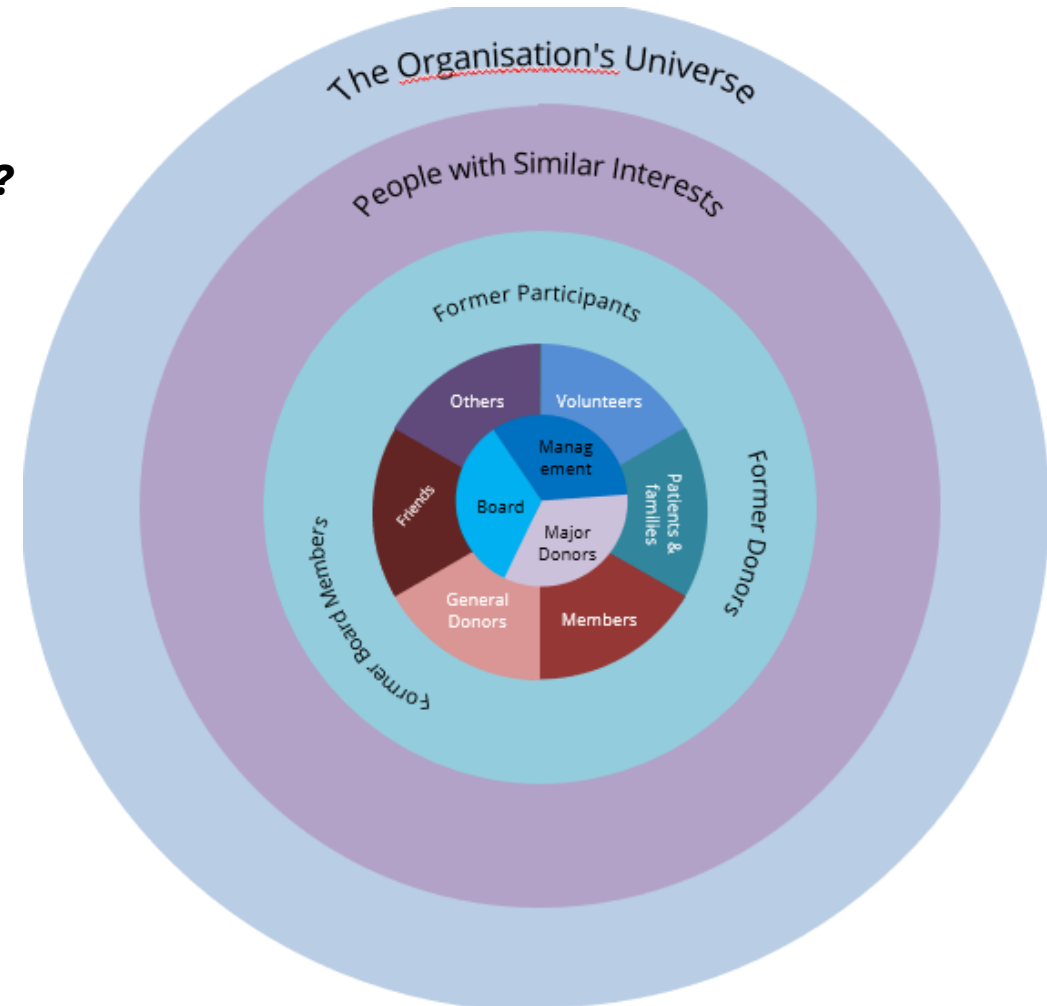


5. STRUCTURED FUNDRAISING PROGRAM

WHERE DO YOU FIND YOUR PROSPECTIVE DONORS?

1. Trusts & Foundations
2. Existing networks:
 - Grateful patients and families
 - Current and past donors
 - Board members
 - Other interested parties

CAPACITY and INCLINATION



5. STRUCTURED FUNDRAISING PROGRAM

HOW SHOULD YOU ENGAGE WITH THEM?

Cultivation and stewardship program that is targeted and inviting

- Communications
- Events – large, small, intimate
- Formal and informal interaction
- Recognition

Remember - it takes a village

