

“Fundraising is the servant of
philanthropy.

The privilege to ask for
philanthropic support depends on
the public benefit, the social need
being filled by the organization
doing the asking.”

- Hank Rosso

Fundraising is built on a strong case + creative communication.

- If you don't ask you don't get!

Philosophical Underpinnings

- “Fundraising is the gentle art of teaching people the joy of giving.” –H. Rosso
- Governing board must insure the public trust of the organization if fundraising is to succeed.
- Fundraising is never an end in itself. It is purposive drawing both meaning and essence from the ends that are served. It is values based. It must serve a large cause.
- Organizations earn the right to ask for funds through responsiveness to needs, allegiance to mission, worthiness of programs, stewardship & accountability.
- Gift making is a voluntary exchange. A value must be returned to the donor e.g. recognition, satisfaction in making a difference, belonging, “ownership”, Matching the organizations mission & the donor’s need to give.

Ethics

- “We must be honest in our dealings with donors and organizations. Our behavior must be dependable. We must be true to our word. And to earn integrity we must carry out our work in ways that represent our organizations and our colleagues best. We must keep the promises we make to donors when we accept gifts. We must be loyal to both the organization and the donor.” – E. Temple
- The organization owns the relationship. The benefit should accrue only to the organization.
- Transparency is the beginning of ethical behavior. – Open the organizational processes to public view in the light of the public trust being held.
- Key values: Integrity; Professionalism/Competence; Accurate presentation of information; Compensation rather than a percentage of the campaign; Adherence to the organization’s mission and values.
- Challenges: Donor v. Organization intent; Financial management during times of trouble; Level of expenses for salaries & fundraising (cost/benefit)

Prerequisites for Fundraising Success

1. Commitment & support from all key participants;
2. A clear self image & a strategic plan;
3. Fundraising objectives based on institutional plans, goals, budgets & needs;
4. A compelling case for supporting the organization;
5. Regular assessment of development programs;
6. Volunteer leadership;
7. Ability & readiness of key donors;
8. Competent staff & counsel;
9. Adequate funds for expenses.

Additional Factors to Consider

- Age of the organization;
- Constituency – Generosity is greater when: per capita income is increasing, targeting for educational, healthcare and culture rather than social assistance to the needy.
- Institutions that provide higher quality programs & broader range of services have broader access to givers;
- Involvement of key community leaders;
- Location – urban market provides greater diversity & opportunity;
- People are motivated by urgency, importance & relevance;
- Fundraising must use the discernment model which focuses on helping donors decide how to use wealth for philanthropy;
- The growth of new foundations & donor advised funds is an indicator of the supply side trend in giving.

Why people give

- Religious commitment;
- Interest/belief in the cause/case;
- They are asked;
- Guilt.

Constituencies

- Board;
- Clients;
- Volunteers & Stakeholders;
- People interested in the case;
- The world.

Today's Donor

- High touch
- Tougher customer
- Smarter
- Demands input & involvement
- Philanthropic entrepreneur – seeks a “return on investment”
- Less identified with a singular organization or cause
- Looking for opportunities outside the annual campaign
- Giving reflects personal values

5 Steps of Cultivation

1. Awareness
2. Knowledge
3. Caring
4. Involvement
5. Commitment

Range of Giving Programs

- Annual Giving
- Capital Giving & Major Gifts
- Planned Giving
- Prospect Research & Cultivation
- Foundation & Corporate Partnership