

Your Culture/Ethos of Philanthropy

2020 Carolinas Planned Giving Conference

June J. Bradham, CFRE

September 3, 2020

Virtual

June Bradham, CFRE



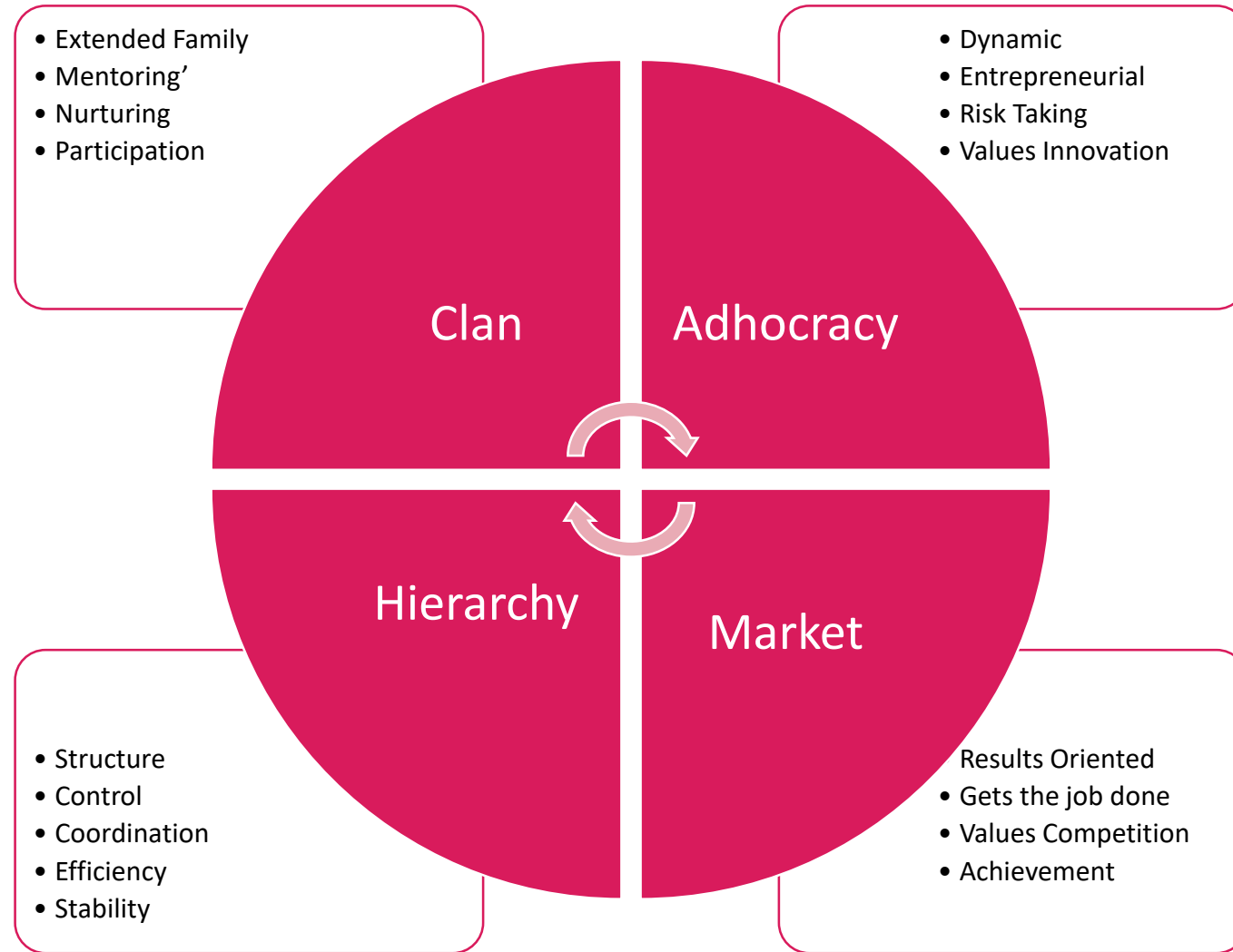
Passionate about the environment
Even more passionate about my
client's passions



“Junebug” to 4 ages 2-13

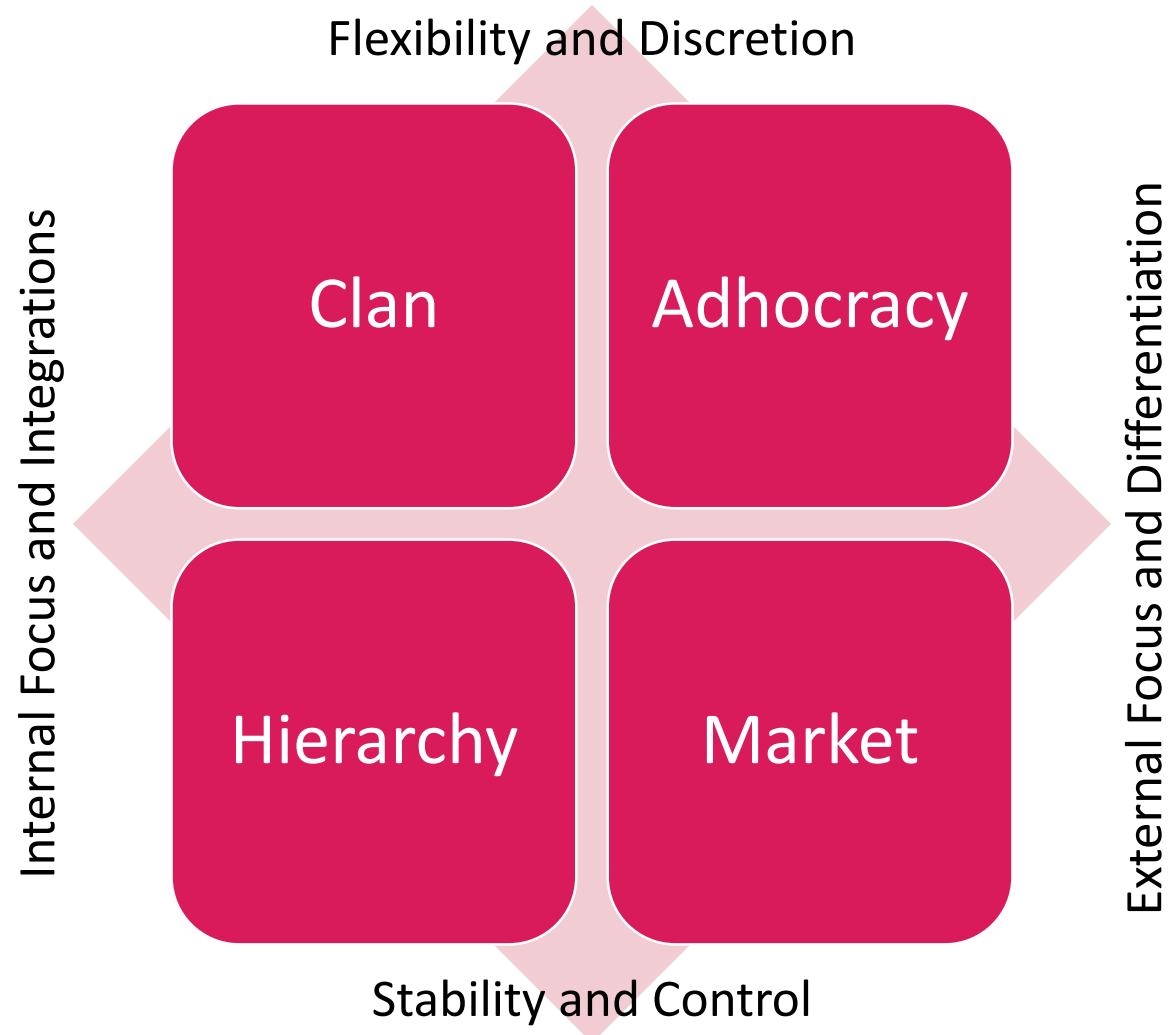
Just bought my first
paddleboard!

Culture/Ethos



*Organizational Culture Assessment Model
Quinn and Cameron
U Michigan*

Culture





Rank each-1 lowest and 3 highest. Add total masterscores, and we'll plot everyone's scores on the big charts.

NEVER (1)	SOMETIMES (2)	ALL THE TIME (3)	MASTER TOTAL	CHOOSE TOP3 BARRIERS of SUCCESS
--------------	------------------	---------------------------	-----------------	--

1. My organization always considers philanthropy as a funding source after evaluating earning and borrowing potential as new projects and programs are considered.
2. When the development team is asked to raise funds, projects and programs have been fully vetted with budgets, impact, services, and buildings by the admin., and approved by the CFO and Board before launching a review of fundraising potential.
3. My organization understands that most funding from philanthropy takes 18-24 months minimum to acquire a major gift, therefore adequate lead time is considered when budgeting and planning.
4. As a planned gifts officer, my organization understands the projected time of 3-7 years for a gift to mature (source?).
5. Senior member of the development team is always consulted by the organization's admin. to review major projects and programs early in the budgeting and planning to advise its suitability to attract philanthropy.
6. My senior leadership plays an active role in stewarding, publicly and privately recognizing donors when appropriate.
7. Program/clinical staffs engaged proactively identifying related families for potential philanthropy when appropriate.
8. My organization is proactive in identifying meaningful cases for support.
9. My organization recruits governing board members with philanthropy as a top criteria.
10. Our top leader speaks frequently about mission and philanthropy in the communities where we have a presence.
11. Major and planned gift officers, including me, are consistent in making face to face visits that move prospective donors toward meaningful gifts.
12. Development staff has adequate budget, technology and support to identify and qualify donors to meet our goals.
13. I carry a portfolio of no more than 50 major/leadership prospects at a time (or major leadership gift officers carry this load).
14. Other

TOTAL 1s	TOTAL 2s	TOTAL 3s	TOTAL 1, 2, 3s
----------	----------	----------	----------------

The purpose of these questions is to evaluate your opinion of the culture of philanthropy in your organization. You will see any specific answers but you.



Exercise 1

Culture and Barriers

1. Read Each Statement 1-13
2. Rank Each Statement Never (1), Sometimes (2), All the Time (3)
3. Add total Master Score 1-13 and put total at bottom of the column
4. When prompted with poll, answer with total Master Score as follows: between 1-9, 1-16, 17-23, 24-30
5. Now look again at all 13 statements again. You may only choose 3 of the 13 as top barriers to fundraising success. Mark your top three barriers in that column
6. When prompted to enter the barriers, notice that the statements are labelled 1-6 and 7-13. Polling is limited to 10 so we divided them. You can scroll through all statements
7. Use the Q&A to ask anything at any time.



Culture Poll



Culture Q&A

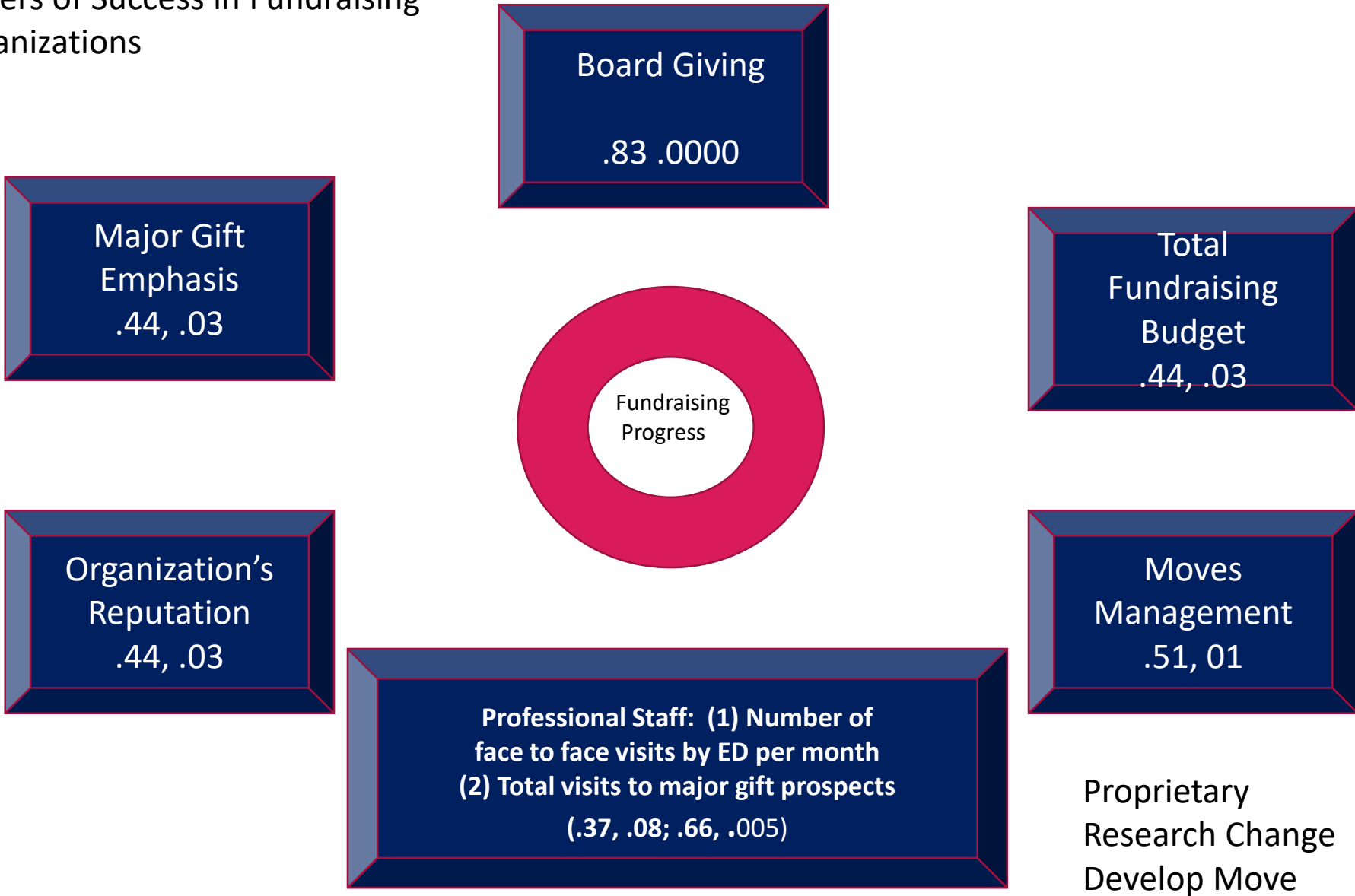


Barriers Poll



Barriers Q&A

Drivers of Success in Fundraising Organizations



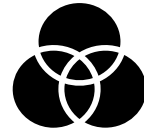
Proprietary
Research Change
Develop Move



Drivers of Success

Q&A

Thank you!



June J Bradham, CFRE
Change Develop Move

june@changedevelopmove.com