Advancing a Culture of Philanthropy

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Chicago, Illinois

Presenters

Brian Lauterbach, CFRE
Founder and CEO
DonorPath

Molly Philosophos
Director of Development
Hephzibah Children’s Association

Susan Mchabcheb, CFRE
Global Philanthropy Advisor
SOS Children’s Villages International

John Huebler, MPA, CFRE
Senior Major Gift Officer
Illinois Institute of Technology

Session objectives

● Define fundraising & philanthropy

● Assess your organization, or a potential employer's, culture of philanthropy

● Identify key indicators to understand an organization's culture during candidacy
Session objectives

- Learn approaches to improve or refresh an organization's culture of philanthropy
- Take steps to create a culture of philanthropy

Definitions

- **Culture** is a system of shared assumptions, values, and beliefs, which governs how people behave in organizations. These shared values have a strong influence on the people in the organization and dictate how they dress, act, and perform their jobs.

- **Philanthropy** means "love of humanity" in the sense of caring, nourishing, developing and enhancing "what it is to be human" on both the benefactors' and beneficiaries' parts.

Our definition of “Advancing a culture of philanthropy” is to move an organization forward, so that its overriding shared assumptions, values, and beliefs are rooted in a love of humanity, caring, nourishing, and developing & enhancing the lives of human beings.
TIME HAS A WAY OF REVEALING WHAT WE TRY TO KEEP HIDDEN.

- Lea Stofenek
  www.fitnesstogrow.com
The Williams Group (Karla A. Williams, M.A., ACFRE) uses a 2-part tool to help assess an organization’s culture of philanthropy.

As published in “Think. Say. Do. – How to build a philanthropic culture in your organization,” Advancing Philanthropy, Winter 2015

The full tool is provided in your conference materials, available at www.afpchicago.org/conference-handouts

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Assessment tool - Williams

Part 1 is a 12-question yes/no checklist for board members, followed by a discussion of what action is needed to turn a "no" into a "yes"

1. I can articulate "why" I was initially recruited to serve on the board
2. I am able to "tell a story" about three different clients/situations/outcomes
3. I talk about this organization with my friends and colleagues—at work, at parties and even in the grocery line
4. I am considering a legacy gift to this organization in the future

Part 2 is a companion 11-question checklist for staff members
Assessment tool - Williams

- I can describe the programs/projects that philanthropy helps to underwrite and I know what it doesn't fund
- I have personally met and know at least five donors by their first names
- Every year, I make my own gift to the staff/employee campaign
- The role of fundraising belongs to all of us, and I will do whatever I can to develop strong relationships with donors

Assessment tool - Osborne

The Osborne Group (Karen Osborne, et.al) uses a 23-component “Culture of Philanthropy, Stewardship and Engagement Scorecard” to help assess an organization’s culture of philanthropy

The full tool is provided in your conference materials, available at www.afpchicago.org/conference-handouts

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Assessment tool - Osborne

Each component is scored on a 5-point scale:

1 = doesn’t exist
2 = planning stages
3 = on our way
4 = almost there
5 = 100% achieved
Assessment tool - Osborne

Scoring:

- 92 to 115  Excellent
- 69 to 91   Good
- 46 to 68   Needs Improvement
- 23 to 45   Yikes

Assessment tool - Osborne

Components include:

- Everyone believes in the mission, vision and in philanthropy, and all give generously and joyfully (including….)

- 100% of Board members – both governing and foundation if applicable (and/or Advisory Board members)

Assessment tool - Osborne

Components include:

- Learning environment within the organization concerning philanthropy

- CEO gives 20% or more of time helping identify potential donors, develop donor strategies and visit plans, engage, solicit and provide stewardship for donors
Assessment tool - Osborne

Components include:

- Everyone involved in fund development – as a donor or participant - feels valued and appreciated for their contributions; everyone receives a timely thank you and impact reports before the next solicitation.

Resources

- These articles and the two assessment tools, are available at:
  
  www.afpchicago.org/conference-handouts

Contact us

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian Lauterbach</td>
<td>Founder and CEO DonorPath</td>
<td><a href="mailto:brian@donorpath.org">brian@donorpath.org</a> (312) 561-5047</td>
</tr>
<tr>
<td>Molly Philosophos</td>
<td>Director of Development Hephzibah Children's Association</td>
<td><a href="mailto:mphilosophos@hephzibahome.org">mphilosophos@hephzibahome.org</a> (708) 649-7158</td>
</tr>
<tr>
<td>Susan Mchabcheb</td>
<td>Global Philanthropy Advisor SOS Children's Villages International</td>
<td><a href="mailto:Susan.Mchabcheb@sos-kd.org">Susan.Mchabcheb@sos-kd.org</a> (630) 209-7127</td>
</tr>
<tr>
<td>John Huebler</td>
<td>Senior Major Gift Officer Illinois Institute of Technology</td>
<td><a href="mailto:jhuebler@iit.edu">jhuebler@iit.edu</a> (312) 725-3243</td>
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Thank you for attending!

Brian  
Molly

Susan  
John