Assessing Your Organization’s Culture of Philanthropy

Part of Major Gift Academy’s Module 1

We have become absolutely convinced that, unless non-profits radically change their approach with donors and adopt a true culture of philanthropy, they will not thrive.

We define a culture of philanthropy like this: From your CEO down to the janitor, your non-profit embraces your donors as central to your mission, as central as your organization’s programs to change the world.

By taking this Culture of Philanthropy test you can find clear opportunities to change your organization to become more donor-centered. This test is designed not to discourage you but to give you a clear picture of where you are and where you want to go.

In the following sections, rate your organization 1-5 according to the following guide. There may be a question that relates to an area that you personally don’t work with or is not in your control. If so, go ahead and answer it for your organization even though it may say “I” rather than “they” in the question.

1 – No I/we do not
2 – I/we do a tiny bit
3 – Sometimes I/we do
4 – I/we mostly do
5 – I/we definitely do

Section A: Getting Your Head and Heart Right

Yes, this is about your organization – but if you don’t personally have your head and heart right, you will never be able to participate fully in developing a culture of philanthropy within your organization. Passion, strength and determination is required.

1. Do you want to do this work? If you don’t love fundraising, then you shouldn’t be in this business. Not “do you love your organization?” But rather, do you love fundraising?
2. Are you passionate about changing the world? This has to be inherent in you. Do you want to make a difference?
3. Are you passionate about the mission of the organization?
4. Do you get excited to ask people to give away their money?
5. Do you feel that helping people give away their money is one the greatest things you can do for that person?
6. Do you believe you can make change happen?
Section B: Donors Included in Our Mission

At Veritus, we believe that if we are to create a true culture of philanthropy in our organizations, donors have to be part of our mission – not a way to get our mission accomplished, but PART of the mission. Take some time to reflect on this for just a bit. We believe this is a radical idea. So, what does this mean? It means this:

1. Are your donors actually included in your mission statement?

2. Do you understand that the role of your organization is really to become a bridge between the world’s greatest needs and your donor’s passion to meet those needs?

3. Is your organization interested in results and impact over ratios? Do you hire quality program people and pay them well because you are more concerned with your mission than watchdog agencies evaluating your overhead?

4. Is half of your time, energy and resources devoted to your donors?

5. Are these two questions asked in all of your conversations with staff about programs, projects and need: “Will our donors think this is a good idea?” and “Will our donors feel this is a good investment?”

6. Do donors have a seat at your table? You value their input, opinions and ideas on how to make your organization more effective. You provide opportunities for your staff to hear their voice.

7. Do you ask? Your organization realizes that donors want to be asked to support you financially. They want to help you change the world and you are bold in your asking.

8. Does everyone in the organization have a relationship with donors? Your organization realizes that donors are not just cared for by “development professionals,” but that the entire staff is called into relationship with donors.

9. Is your leadership passionate about philanthropy and donors? Leaders know donors. They are actively cultivating and nurturing relationships. These leaders invest in fundraising, and especially in major gifts. They understand that cultivating a relationship with a donor takes time. Leaders do everything they can to reach out to others and invite them to support the organization.

10. Does your leadership welcome asking for support? Both the executive team and the board of directors actively give and get others to financially support the organization. They are not only trying to make sure the non-profit is running correctly; they look at themselves as true ambassadors of the mission. Leaders like this are constantly talking about what their organization does and why it’s so important to support it.

11. Does your executive team reach out to donors? They see the value in actively engaging donors in the problems and concerns of the non-profit because they know that as stakeholders they want to be part of the solution. Leaders who embrace a culture of philanthropy are open and honest about the good and the bad with donors. They don’t hide things.
12. Does the entire Board of Directors give financially to the organization? Good leadership also provides gentle peer pressure to all members of the board to give financially. The board is the development team’s greatest cheerleader, and they actively reach out to help promote the organization.

13. When looking for a new leader, does the job description of that position stress that half of their time will be devoted to donors and philanthropy?

14. Do you codify all of the principles of a culture of philanthropy in your employee handbook? If you don’t have it in writing, it won’t happen.

15. Does your hiring process include the role of fundraising for every employee, letting them know what their role is? Any potential employee has to know up front what fundraising role they will play at your organization, and the employee should know that your mission includes donors.

16. Do you invite major donors to your staff meetings?

17. Do you take program (and other) staff on major donor visits?

18. Do you include major donors at organizational celebrations like staff meetings? Inviting your donors to your celebrations allows your donors to see the passion of your organization’s staff. Donors love to fund people with passion.

19. Are your donors celebrated? We’re not just talking about recognizing a donor at a banquet or a ribbon cutting, but in everyday, small ways in your meetings, the little note from a program person, or a picture sent from an MGO.

20. At staff meetings do you tell donor stories? We do a great job with telling stories about our programs, but we often overlook the stories of our donors.

Section C: Telling Your Story

Now let’s talk about storytelling. Do you know your organization’s story? Do you know how it began and why it exists? Have you ever considered why people support your organization? If your organization desires a true culture of philanthropy, your story must be known by everyone. It’s your story that brings you together as a team around a common mission. It’s why you exist. Telling that story on a regular basis is critical for your staff, board and donors. It keeps you focused on who you are and prevents you from straying off course.

1. Did or do you spend quality time getting your story right? Make sure it is well written, that it can be told by leaders with passion and conviction, and that it stirs the heart.

2. Is your mission, vision and values placed prominently in the foyer of your office space? That way anyone walking into your office knows what you are about.

3. Have you created an “our story” piece that goes into your employee handbook, your board orientation folder and a place on your website?
4. Does every staff and board meeting start with a “your story segment?” This reiterates over and over again your mission, vision and values as an organization and WHY you exist. 

5. Do you create “engagement” events and touchpoints for donors and volunteers to hear “your story” and invite involvement and dialogue? 

6. Do you tell your story over and over to everyone that will engage with you, lest anyone forget? Tell it in meetings, in the elevator, at galas, on face-to-face donor visits, to your significant others... this is important. 

Section D: Expressing the Need 

If your organization truly wants to have a culture of philanthropy, then staff will be bold and non-apologetic as they speak with conviction to major donors and stakeholders about the need you are trying to alleviate. Frankly, if you cannot talk about the need, then you are not honoring your donors.

1. Are you able to describe the need in emotional and human terms — without sugar coating? If you want donors to really respond, they have to know the real stuff. 

2. Do you know the facts about the need? This includes statistics and the long-term financial implications. 

3. Have you identified the causes of the need — why we have this need? You must be able to give your donors context about why the need exists.

4. Can you clearly state what will happen if the need is not met? It honors your donors (not threatens them) to help them understand the negative consequences that will arise if the need is not met.

Your Score 

Total up all the numbers you assigned in your answers to each question: 

How did you do? Let these categories be your guide:

36 to 60 Something is seriously wrong
61 to 90 Your organization has many opportunities for improvement
91 to 130 You’re on the right track; look at specific areas to improve.
131 to 160 Things are looking good – your culture is reasonably healthy.
161 to 180 Amazing! Your organization is in an elite group of donor-centered non-profits.