



**MARKETING & BUSINESS  
SOLUTIONS**

**Presented by Merrill Stewart, CFRE**

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**Coping with  
Decreasing  
Resources**

**Building a Culture of  
Philanthropy**

# What we will cover:

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- **Building a Foundation and Culture of Philanthropy**
- **Relationships**
  - **What is best for you?**
  - **How do I cultivate?**

# A Culture of Philanthropy



## POLL

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**How many of you already have a culture of philanthropy?**



# A Culture of Philanthropy

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**Defined:** A culture of philanthropy is a set of organizational values and practices that support and nurture development within a nonprofit organization. It's an important part of building cohesion and teamwork within an organization and it's imperative that every individual understands how they contribute to this culture.



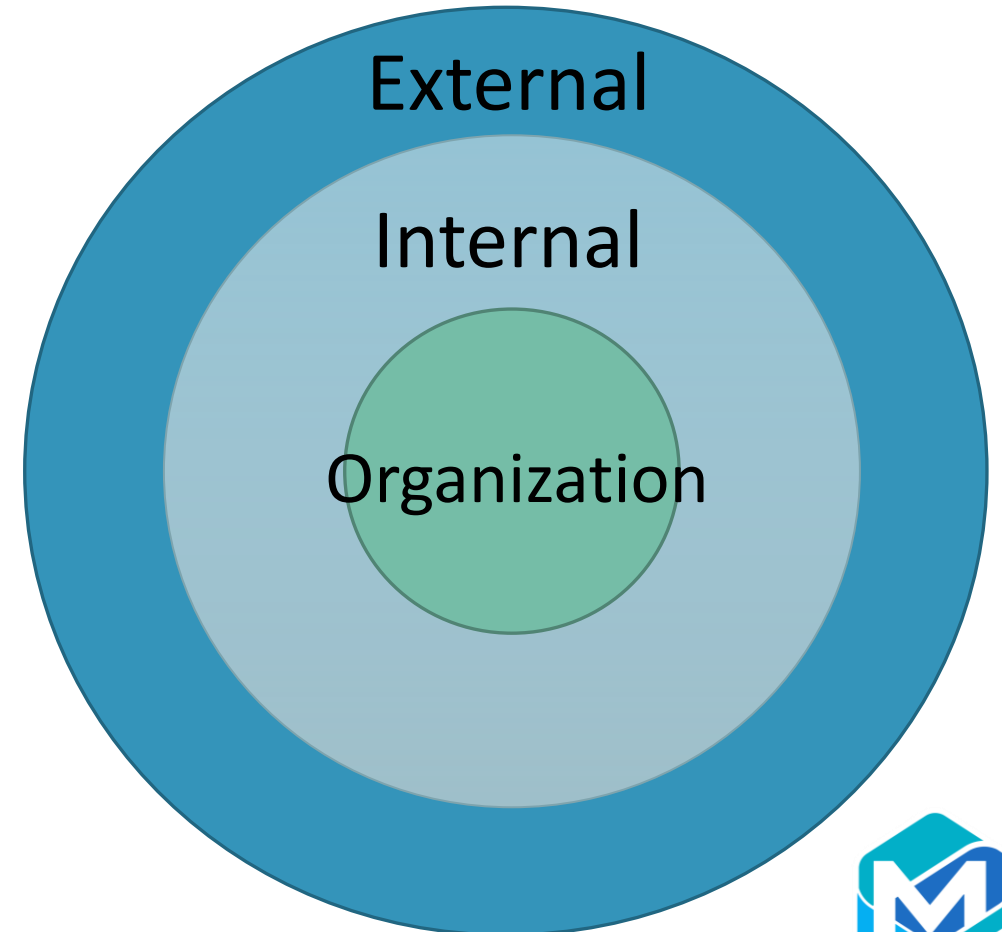
# A Culture of Philanthropy

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Who's responsible?

**EVERYONE**

- Core = Organization  
Mission
- Internal Stakeholders
- External Stakeholders



# A Culture of Philanthropy

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**Internal Stakeholders:** people who are already committed to serving your organization

- Administration
- Staff
- Volunteers
- Board members
- Donors



# A Culture of Philanthropy

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**External Stakeholders:** people who are impacted by your work as clients/constituents, community partners, and others.

- Recipients of Services
- Prospects
- Government Leaders
- Community Leaders





# What does a Culture of Philanthropy look like?

Source: [thefundraisingresource.com](http://thefundraisingresource.com)



Fund development is seen as mission-aligned



Core values support a culture of philanthropy



Systems, process and staffing support donor needs



Leadership is engaged in fundraising



Everyone knows case for giving and is an ambassador



Guide leadership and employee behavior



Inform all decision-making



Are prioritized in new hire and board training

DOD is a leader in organization's planning and strategy

CEO is an active role model

Board shares responsibility for fundraising goals



# A Culture of Philanthropy

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**Where do we start?**

**AT THE TOP – everyone needs a personal WHY**

**Fundraising is about:**

- Creating & building relationships
- Trust
- Making a mindful connection
- Gratitude





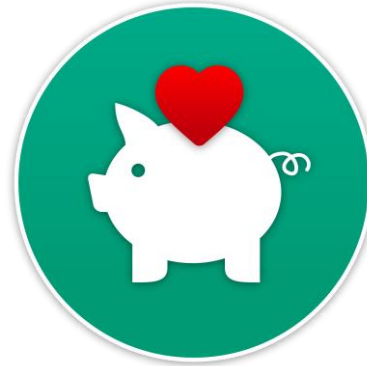
Define Your Needs & Value



# Start with the end in mind

Goals

**(\$)** Gift  
or In-kind



**Volunteers**



**Advocates**



# Define Your Needs

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## Clearly define your needs!

- It is hard to ask for help if you do not know what you need.
  - What do you need?
  - Why do you need it?
  - Who do you need it for?



## Define Your Value

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**What is it that you can do, if your needs are fulfilled?**

- What value do you bring to others? The Community?
- What difference will it make?
- What is the impact?
- Who will benefit?



## POLL

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**How many of you already know  
what you need?**

- What types of things do you need?



## Worksheet

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**How many of you already know  
what you need?**

- What types of things do you need?







## Who to Activate



# Who to Activate

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## Who do we need to connect with?

Individuals/Funders/Companies who:

- Align with your mission or have a connection
- Have the capacity to provide support
- Have a gap that you can fulfill
  - volunteers, audience, expertise, value





## Activating Others – Internal Stakeholders



# Activating **Internal** Stakeholders

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## Leadership and Board Members

### Identify Roles

**Ask: What role do you feel most comfortable with?**

- Advocate & Educate
- Donate Time or Money
- Connect Others to the Mission
- Ask



# Activating **Internal** Stakeholders

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## Helping them tell their story:

- It must be authentic.
- To be authentic, they must experience something or have an emotional connection.
- Authenticity sparks Connection, Trust, and Vulnerability



# Activating **Internal** Stakeholders

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## **Helping them tell their story - Components:**

- Who or what introduced you to this organization?
- What makes you proud of this nonprofit?
- What is something that most people do not know about this nonprofit?
- What is your connection with the work being done?
- And finally, which stories resonate with you, in general?



# Activating **Internal** Stakeholders

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## 5 Components of the Story You Need to be able to Tell:

1. Why do I Care?
2. Why should someone contribute to our organization?
3. Story about someone who your organization has helped.
4. What do the funds support?
5. What is the vision for the future?



Why should  
someone  
contribute?

## Why should someone contribute to our organization?

- Better access to services
- Specialty expertise
- Local Community Impact
- Network of Care
- Connection point for resources





What are you  
raising money  
for?

# What are you raising money for?

## Go back to your needs

- What difference do private contributions make in our organization?
- Who is the audience that is impacted?
- Why do they need our help?



## Impact Story

# Share a story about someone impacted by the organization.

- It can be something simple:
- Three sentence story about a real person impacted by the organization.
- Think of someone you know, maybe it is you, a family member, a friend or colleague. What happened in the situation.



Putting it all  
together

## Your Story:

- I care because...
- It is important to support this organization because...
- A story of impact (short)
- The funds go to support....
- My vision for the future is...





## Activating Others – External Stakeholders



# Activating **External** Stakeholders

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## 1. Educate

- Identify ways you can invite someone you know to learn more about what you do.
- Tour of your mission (Lunch and Learn)
- Invite them to be your guest at an event
- Don't Ask Yet.....



# Activating **External** Stakeholders

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## 2. Listen

- What did they learn? What did they connect with?
- Then just listen!
- The goal is to learn how they see themselves being involved.
- Don't ask yet...



# Activating **External** Stakeholders

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## 3. Ask

- Make a Match – match the donors' interest with a need.
- Ask them for support
- Say Thank You
- Say Thank You Again!
- Update on the impact of their contribution.



# Activating **External** Stakeholders

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## 4. Invite Others

- Keep inviting the donor to support the next need that matches their interest.
- Keep them engaged.
- Ask them to invite others they know to learn more about what you do/impact.



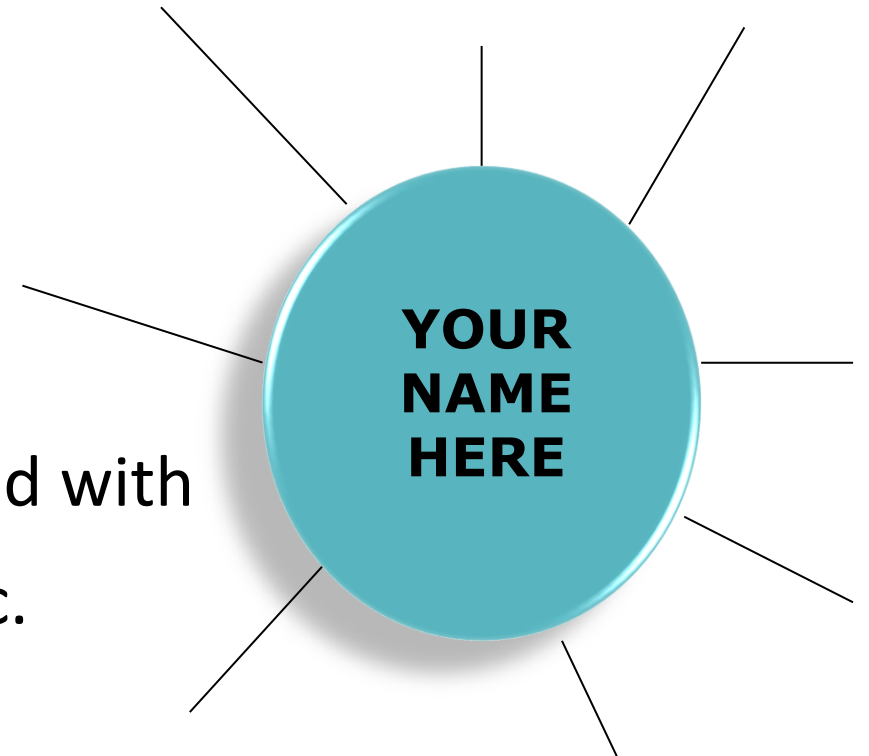


# Who to Activate – Finding Them

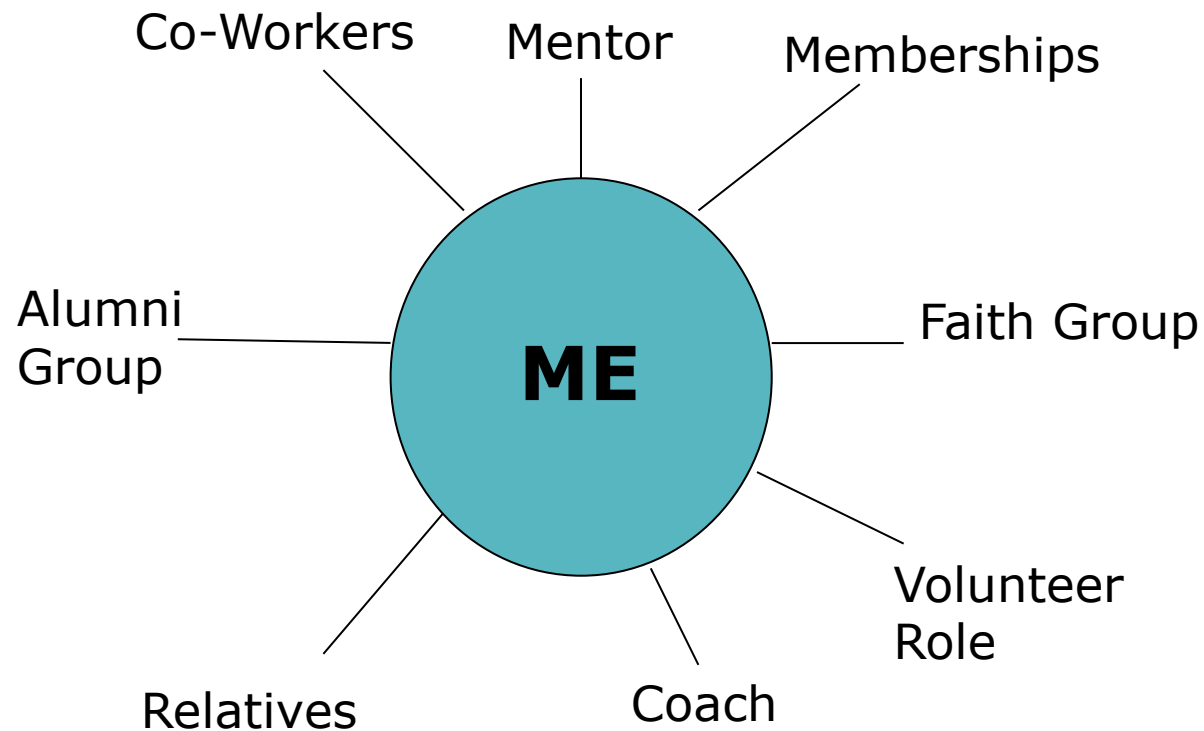
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## Make Connections

- Who is connected to you?
- Create a Relationship Map
- Identify groups you are involved with
- Colleagues, Family, Friends, Etc.



# Connect



What **Resources** do your relationships provide?

Education	Time
Advice	Influence
Sponsorships	Social Responsibility
Reputation	Contacts



# Connect

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**YOUR  
NAME  
HERE**

- Write down 3 names of connections that would be interested in hearing from you
- Implement your relationship model – include stakeholders
- Learn about their passion
- Connect them with opportunities to give
- Ask them to connect you with others



**Remember**

## **What our stakeholders need:**

- To know the Why?
- Know the Mission
- Understand the Needs and Resources
- An emotional connection / story
- To be shown impact
- Feel appreciated



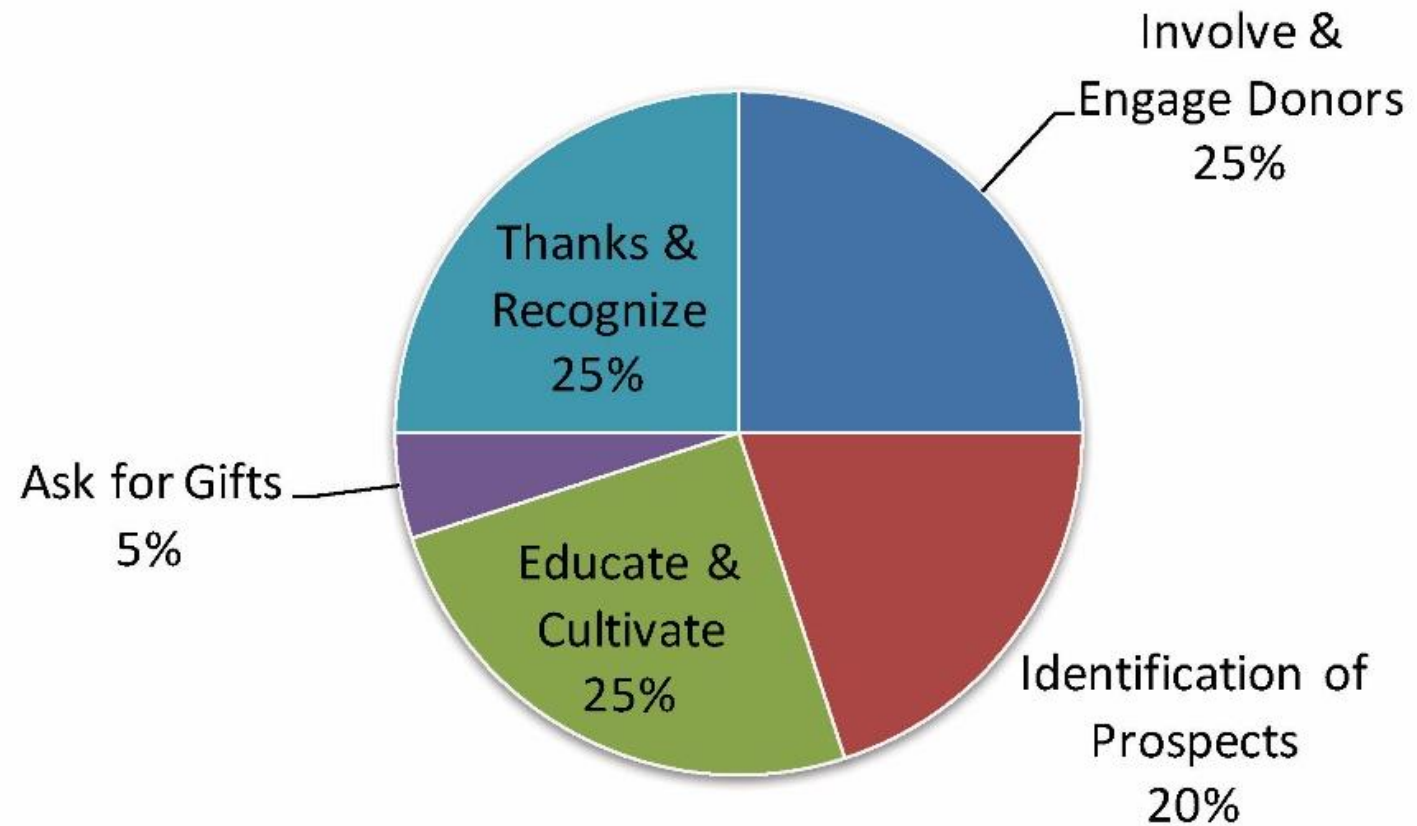


## Cultivation Strategies / Initiatives



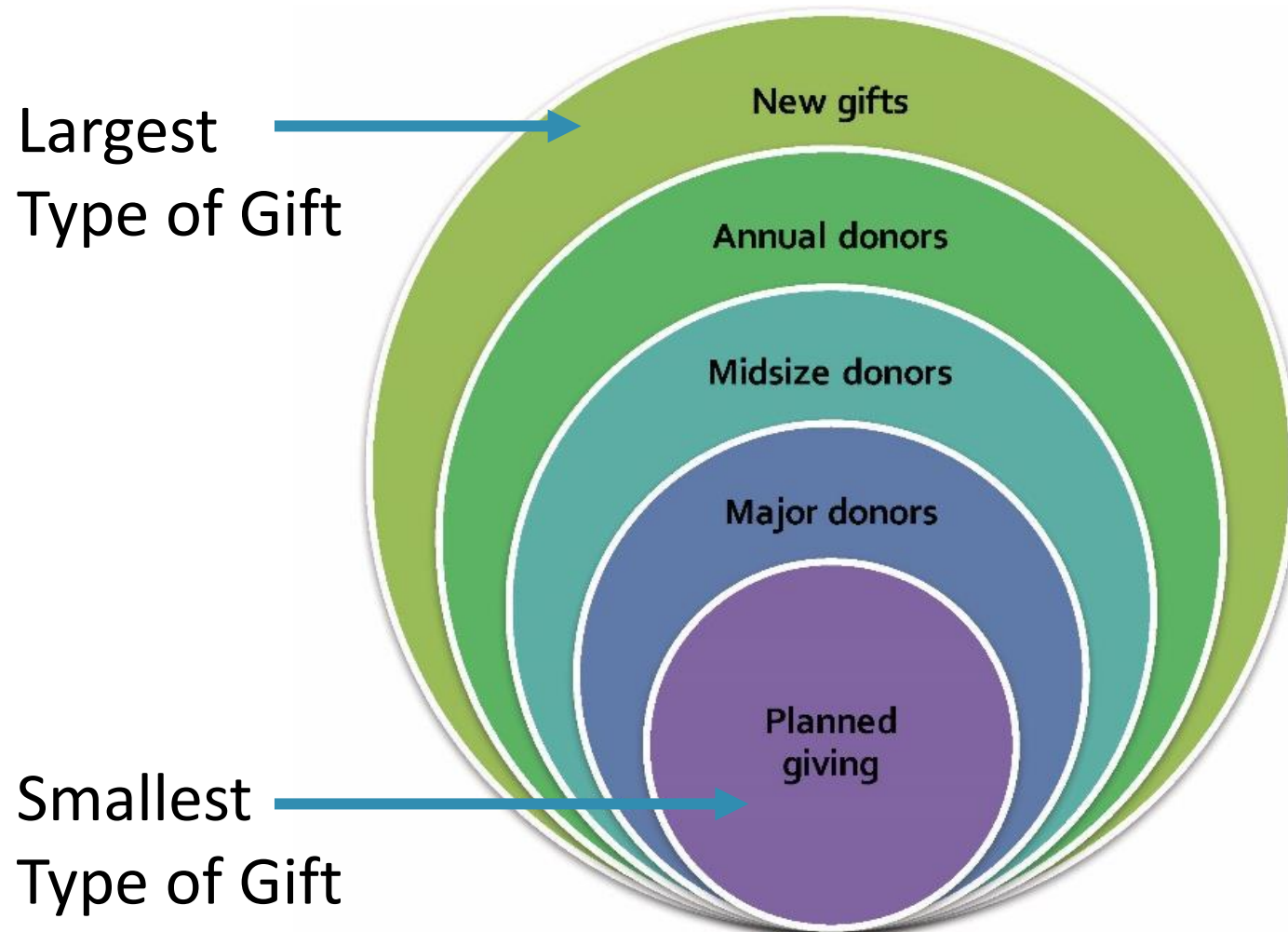
# Cultivation

## Fundraising by Time



# Cultivation – Types of Gifts

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# Initiatives – Individual Giving

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- **Annual Giving**
  - Annual Giving by individuals totaled an estimated \$319.04 billion, declining 6.4 percent in 2022 (Giving USA Report 2023)
  - Donor Retention Crucial
  - Personalize messages (online, direct mail, entry points)
  - Report Impact





# Initiatives – Individual Giving

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- **Major Gifts**
  - **Define what it is for you**
  - **Matchmaking – Your needs / Their needs**
  - Donor Advised Funds
  - Tell your story and attract support
  - Build Trust / Build Relationships
  - Move up Annual Giving Donors
  - Report Impact



# Initiatives

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- **Online Giving**
  - Utilize your communications channels with a call to action – you have to “ASK”
  - Social Media
  - E-Communication
  - Peer-to-Peer Fundraising
  - Website



# Initiatives

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- **Corporate Giving**
  - Find the right partner (values, vision, goals)
  - Marketing is Key
  - Provide options:
    - Annual Initiatives vs. 1-off options
  - Marketing vs. Philanthropy



# Initiatives

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- **Special Events**
  - Events are a great entry point to meet new donors
  - Tell your story – talk about your impact
  - In-person / Virtual
  - Start Small then Grow
  - FOLLOW UP (Cultivation is key)





**We are all part  
of Fundraising**



**“Donors don’t give to institutions. They invest in ideas and people in whom they believe.” -Anonymous**

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