



Six Steps to Achieving a Culture of Philanthropy and Stewardship

A Resource of The Osborne Group, Inc.

We are defining a culture of philanthropy and stewardship as follows. "Everyone within the institution or organization, including recipients of services and their families, and the board of directors or trustees, UNDERSTANDS, EMBRACES, AND ACTS ON his or her roles and responsibilities in philanthropy and stewardship in a collaborative and donor-centric manner."

The Benefits:

1. *Increased giving from all sources (staff, recipients, families, alumni, friends, current donors, new donors)*
2. *More personalized and effective stewardship of donors resulting in increased giving and higher donor retention*
3. *More trust and cooperation among internal work groups resulting in greater ease in accomplishing work and increased efficiency*
4. *Increased social capital and viral marketing*

The Steps:

1. A great institution and a successful fundraising operation begin with a clear and compelling mission and **an urgent vision** undergirded with shared, stated values. The mission and vision are the reason the institution needs to achieve a culture of philanthropy and stewardship. A driving institutional vision provides the urgency for change.
2. **Change requires a vision as well.** Imagining the organization once it achieves the culture of philanthropy and stewardship paints a picture all constituencies can grasp. What will everyone do differently with what results? Change is personal. The change vision must speak to what's in it for the individuals who need to change. Get the word out. Spread the vision often and throughout the organization.
3. **Start with champions and modeling behavior.** John Kotter, leadership guru, calls these champions a "guiding coalition." Who are those influential people who already understand, embrace, and act on their roles in philanthropy and stewardship? We need them to help us bring others along. According to change expert Jeanie Daniel Duck, "People believe because they actually see the new behavior at work and working."
4. **Wow your team.** It is hard to make others feel great about giving and participating in philanthropy, if the proposed change agent feels beleaguered or under-appreciated. We must invest in our people capital first. Demonstrate great customer service internally if we want our staffs to provide it to others.
5. **You need a plan.** A vision without a plan is just a pipedream. Assess your current strengths and weaknesses. Develop concrete, measurable goals for achieving a culture of philanthropy and stewardship. For example, if none of the senior administrators give, a goal might be to achieve 100% giving by a specific date. Strategies and tactics follow. Make sure the strategies include removing obstacles, changing systems, or structures that undermine achieving the desired culture.
6. **Institutionalize the new changes.** Document the new policies and procedures. Put philanthropy and stewardship on the institutional dashboard. Include it in performance measures. Make it a stated part of the values statement. Reward and celebrate success.

Contact us at 914 428 7777, mail@theosbornegroup.com or visit us at www.theosbornegroup.com, if you would like to learn more about:

- ***Achieving a culture of stewardship and philanthropy,***
- ***Building your current stewardship, major gifts or annual giving program,***
- ***Our service as campaign counsel and feasibility studies***
- ***Or any aspect of philanthropy, market research, or organizational management including Board development and strategic planning***