



Welcome and Thank You!

1

Development is not easy work. And certainly not for for the faint of heart. I admire and respect what each of you do for your organization and our community.

2

I am not an attorney!

3

This is a safe space – open dialogue and questions are welcomed and encouraged

4

You have probably already heard everything I'm about to share with you



What is Donor Intent? *(Philanthropy Roundtable)*

- Donor intent is the expression of a donor's values and mission for his or her philanthropy.
- Protecting donor intent, is a commitment to honoring a donor's principles, to maintain the integrity of his or her philanthropy over time.
- Those entrusted to carry out the details should be faithful to that trust.
- Donor intent is protected by law, and donors can sue organizations that don't use their gifts as intended.



Donor Intent Protection Act

- In 2023, Philanthropy Roundtable introduced a new model bill in the states – the *Donor Intent Protection Act (DIPA)*.
- The *Donor Intent Protection Act* gives donors peace of mind that should they need to take legal action, they have the standing to do so.
- The *Donor Intent Protection Act* has been enacted in Georgia, Kansas, Iowa, and Kentucky.



Stewardship of the Donor

Good stewardship means charities strive to take the utmost care in honoring their commitments to a donor's gift intent.



4 Core Principles to good Stewardship

- 1 Know Thyself
- 2 Know Thy Donor
- 3 Have A Plan
- 4 Execute that Plan Religiously



Principle #1

Know Thyself





CFGFW's Core Focus

To inspire enduring philanthropy by encouraging charitable giving, conducting meaningful grantmaking, and leading community initiatives



Our Core Values

Equity

We strive to honor the unique needs of each individual and organization, providing equitable access to resources and opportunities.

Passion

We pursue our work with enthusiasm and dedication because we love our community.

Impact

Each decision should move us toward positive and lasting change, encouraging growth, and propelling our community forward.

Integrity

Our stakeholders trust us with their resources, in perpetuity. We honor donor intent, and act with our community's needs in mind.

Connectedness

We're driven by fostering strong, meaningful relationships with each person we work alongside.



We Do Three Things *(our elevator pitch)*

- 1 We help people make their charitable giving more impactful.
- 2 We connect resources to nonprofits through grantmaking and education
- 3 We provide leadership to address community needs.



The positive momentum in our community is undeniable. We've made great strides and are inspired to do more.

As we look to the future, we find new and unique challenges to take on, and systemic issues to overcome. And we will meet those challenges, united, with resolve.

Advancing as a stronger, healthier, more equitable community means collaborating with open arms, planning with purpose, and working with resilience.

We truly thrive when all of our neighbors experience greater well-being and quality of life.

Together, we will invest, educate, partner, and champion this vision. Let's Rise.



Connected Community

We believe that being an advocate for the underserved, instilling pride, and building relationships creates a sense of belonging.

STRATEGIC FOCUS

- Nonprofit Excellence
- Equitable Community



Inspiring Places

We believe a community filled with inspiring spaces engages, connects, and energizes residents and visitors.

STRATEGIC FOCUS

- Thriving Neighborhoods
- Vibrant Downtown Development
- Connectivity for All



Everyone's Economy

We believe in an economy where every citizen has the opportunity for upward mobility and increased security, and is motivated to achieve their goals.

STRATEGIC FOCUS

- Healthy Entrepreneurialism
- Opportunity to Grow



Lifelong Learning

We believe a culture of lifelong learning helps people flourish—strengthening our workforce, and increasing resiliency.

STRATEGIC FOCUS

- Access to Education and Learning Opportunities
- Workforce and Education Connectivity
- Developing a Skilled Workforce



Healthy Mind and Body

We believe each person in our community can reach their highest potential when they have access to tools and resources that support their mental and physical health.

STRATEGIC FOCUS

- Access to Care
- Healthy Behaviors





Philanthropic Services Team

- Alison Gerardot
Chief Impact Officer
- Kiley Tate-Potts
Director of Philanthropic Services
 - 375 Donor Portfolio
- Jaren Harmon
Donor Engagement Specialist
 - 228 Donor Portfolio
- Jim Griest
Sr. Gift Planning Advisor
 - 100 Professional Advisors Portfolio
- Estela Gutierrez
Impact Assistant



Principle #2

Know Thy Donor





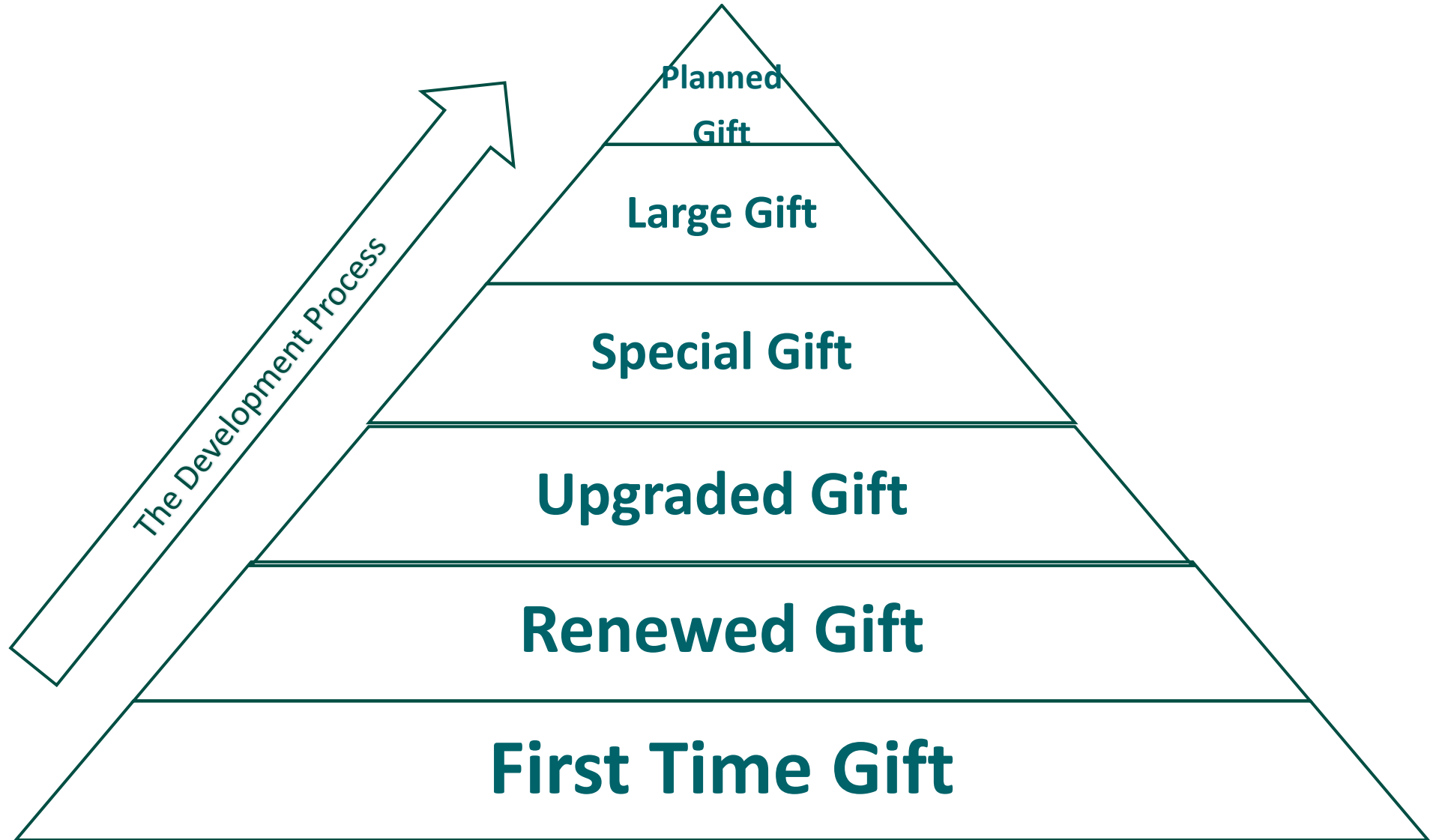
Dominate the listening – 4 keys

The goal is for them to say: “...geez, I’m doing all the talking.”

1. Interact with your donor(s) – face to face preferred
2. Ask open ended questions and let the prospect/donor finish their sentence.
3. Ask questions that begin with “who, what, where, when, and how”
4. Stop talking! Get out of the way and simply listen.

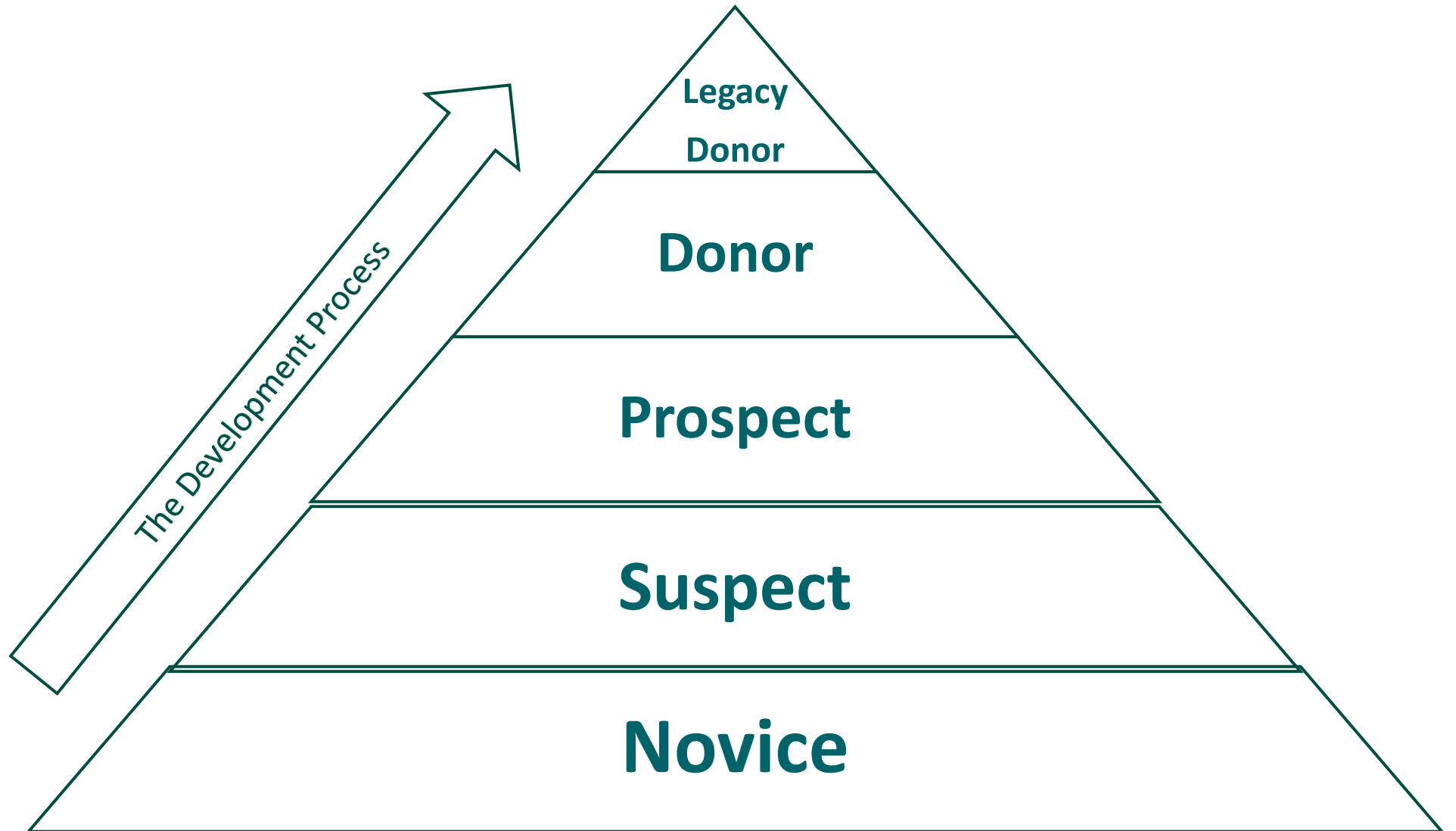


The Development Process – IU School of Philanthropy





Continuum of Prospective and Current Donor Relationships





Continuum of Novice to Legacy Donor





The Novice

- Hasn't participated personally in philanthropy
- Wants to learn about philanthropy
- Wants to learn about needs in the community
- Needs basic information
- Know your elevator speech
- Offer follow up by you or staff
- Basic intro letter or thank you with appropriate information
- Follow up phone call



Continuum of Novice to Suspect





The Suspect

- Has some experience with philanthropy
 - Has some knowledge of needs in the community
 - Wants to learn more
 - “I wish in knew more...”*
 - We want to pursue them
- Elevator pitch
 - Basic intro letter or thank you with appropriate marketing information
 - Follow up phone call to answer questions
 - Set an appointment or extend an invitation



Continuum of Suspect to Prospect





The Prospect

- Has experience with philanthropy – has made a gift
 - Has knowledge of needs in community
 - Wants to be more efficient & effective in their giving
 - “...I could use some help with my giving”
 - Shows interest in our organization
 - We are actively pursuing
- Elevator speech
 - Develop next steps
 - Follow up phone call to make an appointment
 - Discuss/send programs and services
 - Offer Vision/Strategic Plan briefs as appropriate



Continuum of Prospect to Donor





The Donor

- Has now made multiple gifts or a significant gift
- Has knowledge of charitable community, but..
- Wants to know more about other areas or ways to give
 - “...If I wanted to do more what might that look like?”
- “How can I be sure my giving is making a difference?”
- “I have a unique financial situation”
- Develop a plan based on information and questions
- Follow up phone call to make an appointment
- Understand intent and discuss appropriate programs and services and send information
- Site visit to your organization, donor education events, etc.
- Share Vision/Strategic Plan
- Meeting with their professional advisor



Continuum of Donor to Legacy Donor





The Legacy Donor

- Has made a testamentary gift to your organization

“I’ve included you in my estate plans”

- Has a professional advisor assisting with estate plans and charitable giving, etc.
- Might have additional planned giving needs

“how can I get my kids, grandkids, or others more involved?”

- Continue to thank, inform, invite, and engage them

- Special Events and Recognition

- Share Vision/Strategic Plan and initiatives

- Regular meetings with their professional advisor

- Regular face to face appointments and check-ins



Principle #3

Have A Formal, Agreed Upon, Plan





We Do Three Things – 2024 Playbook

As the Community Foundation, we have a deep knowledge and keen understanding of Allen County’s most pressing needs. To address these issues and find solutions, we bring together caring donors, local nonprofits, and community leaders to affect lasting change.

I. DONORS

Goal: Grow assets, in dollars raised and committed, in service of creating a concierge-level service organization

2024 Priority:

- Sr. Gift Planning Advisor
- Strengthen Donor Relationships
- Professional Advisor Strategy & High Net Worth Prospects

II. GRANTS

Goal: Cultivate and grow our relationships with the non-profit community while aligning our grants and investments with our vision

III. COMMUNITY LEADERSHIP

Goal: Focused leadership and advocacy yielding demonstrated improvements in four key areas: Connected Community, Inspiring Places, Everyone’s Economy, Lifelong Learning


ORGANIZATIONAL EXCELLENCE

Goal: Build & Support the Team for We Do Three Things



CFGFW Asset Development Plan

Goals, Strategies, Timetable, Tactics, and Metrics

- Goal 1:** Become a trusted partner and resource to the professional advising community
 - Goal 2:** Foster strong relationships with Fund Holders and Loyal Donors
 - Goal 3:** Increase the number of new funds
 - Goal 4:** Create a diverse portfolio of philanthropic services
- 



Principle #4

Execute That Plan Religiously

(...with consistent, conscientious regularity)





Execute The Plan – The Details

- Asset Development Goal 2 – foster strong donor relations
 - Donor Development – contributor → Friend → Supporter → All Star
 - One on one meetings – meet all fundholders every 3 years
 - Maintain communication - newsletters, social media, annual report, events
 - Leverage Grantmaking opportunities
 - Portfolio Investment Manager Presentations
 - Annual Donor Appreciation Event
 - Legacy Society – special recognition, mum delivery
- Donor Development Continuum
 - Volunteerism
 - Fund Holder
 - Legacy Society
 - Attends Events
 - Regular Giver/Grantor
 - Regular Update Meetings
 - Referral Source
 - Engaged in the community



Execute The Plan – Tools

- Asana Prospect Management – weekly team meetings
 - Donor Development Progress
 - Funds in Progress
 - Current Opportunities
 - Individuals
 - Organizations
 - Corporate
 - Private Foundations
- Community Suite (*Foundant Technologies*) – CRM
 - All things go into C-Suite
 - If someone else has to make the contact...they can pick up from the last correspondence
 - Fund information, relationships, etc.
- Marketing and Communications – current and relevant
 - Website, Social Media, print, digital, newsletters, workshops, speakers, etc.
 - Resources - planned giving tool kit, values exercise, 21/64 certified, etc.
 - Formal Gift Acknowledgment and Thank You process



Tools - Donor Advised Funds

The fastest growing charitable giving instrument

- Formal document – A Donor Fund Agreement (DAF)
- Name of the Fund
- Philanthropic Goals and Objectives - Intent
- Advisors to the Fund – who and approval authority
- Investment of the Funds
- Continuity of the Fund – Successor Provision



Tools - Field of Interest Funds

- Field of Interest Funds benefit organizations that fall within a specific charitable field or category rather than a particular charitable organization. Donors may describe the Field of Interest Funds broadly or narrowly.
- A distinguishing feature of Field of Interest Funds is that the advisory privileges are typically given to the sponsoring organization when the fund is created.



Tools - Designated Endowment Funds

This fund allows you to establish a fund in a family name while designating specific nonprofits you would like to support every year, forever.

Seek to create a legacy of support for your favorite causes.

Want to avoid administrative hassles of charitable giving—from keeping receipts for tax records to simply sending a check regularly.

Want to support specific organizations regularly and in perpetuity.



Tools – Planned Giving Options

Charitable Remainder Trusts - CRT

- Irrevocable trusts that let you donate assets to charity and draw annual income for life or for a specific time period.
- Annual Income payment is based on the value of the assets

Charitable Gift Annuities (simpler than CRT) - CGA

- A planned giving arrangement between a donor and a nonprofit organization that provides the donor with a fixed income for life in exchange for transferring assets to the organization.
- Annual Income payment is fixed

(A charitable gift annuity can be a good option for those who want to make a significant donation to a charity while also receiving a reliable income for life)



CFGFW Philanthropic Services

Strategic Decisions

In May of 2018 made a commitment to meet all of our living fundholders within 3 years

January 2019 – Kiley Tate Potts	Donor Engagement Specialist
February 2021 – Cassie Beer	Donor Engagement Specialist
November 2021 – Jaron Harmon	Donor Engagement Specialist

Intentionally working towards a ‘Concierge Level’ of donor services

- Move from transactional to deep relationships with donor families

Impact of Strengthening Donor Relationships

Since 2017: 244 new funds ~\$80 million in gifts

Year	2017	2018	2019	2020	2021	2022	2023	2024 Estimate
New Funds	17	17	41	35	34	27	33	40
Total Funds*	437	443	473	501	520	537	567	600
Gifts	\$3.3M	\$5.7M	\$10M	\$8.5M	\$15M	\$8M	\$14M	\$14M
Grants	\$8.0M	\$5.6M	\$6.0M	\$7.9M	\$8.1M	\$9.3M	\$10.6M	\$11M

**Includes new, closed, and combined funds for the year.*

Dashboard as of 6/30/2024



YTD 2024 NUMBERS



\$235M
TOTAL ASSETS

15
NEW FUNDS



\$9.8M
DOLLARS RAISED



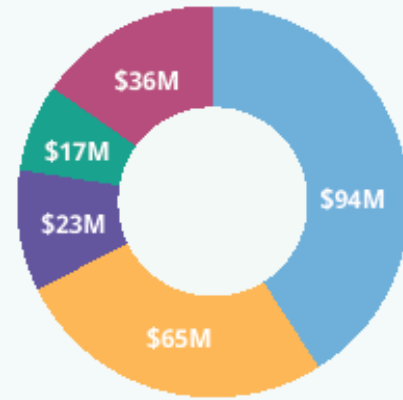
\$4.7M
TOTAL GRANTS
& SCHOLARSHIPS



94
FUNDHOLDER, DONOR,
PROFESSIONAL ADVISOR,
& PROSPECT MEETINGS



ASSET LEVELS BY FUND TYPE



- Donor Advised Funds
- Unrestricted
- Agency Endowments
- Scholarships
- Other: FOI, Designated & Operations

RESERVE LEVELS

	ACTUAL	TARGET	
Operating Reserve	\$1,815,140	\$1,400,000	50% Operating Budget
Fixed Asset Reserve	\$817,108	\$558,000	25% Fixed Asset Cost
Operating Endowment**	\$4,051,051	\$5,600,000	2x Operating Budget
Women's Fund Endowment	\$124,982	\$500,000	
Vision Plan	\$377,841	\$500,000	
Emergency Grantmaking	\$96,099	\$150,000	
DEI Goals	\$69,507	N/A	

**Principal balance = \$4,172,328

CONTRACTED SERVICES

IN-HOUSE FEE FOR SERVICE		OUT-OF-HOUSE FEE FOR SERVICE	
Fundholder #1:	\$5,000	Private Foundation #1:	\$2,000
Fundholder #2:	\$1,000	Private Foundation #2:	\$10,500
Fundholder #3:	\$500	Private Foundation #3:	\$4,000

YTD 2023 NUMBERS



\$202M
TOTAL ASSETS

12
NEW FUNDS



\$2.1M
DOLLARS RAISED



\$5.7M
TOTAL GRANTS
& SCHOLARSHIPS



91
FUNDHOLDER, DONOR,
PROFESSIONAL ADVISOR,
& PROSPECT MEETINGS



Donor Trends – retired and nearing

- 60% of high net worth donors are first generation philanthropists
- More than three-quarters of donors approaching retirement and those who have already retired say charitable giving plays a significant role in their lives, according to a new report from Fidelity Charitable.
- The researchers surveyed 2,512 donors between the ages of 50 and 80 who had given \$500 or more in the previous year. They found that donors in that age range are also interested in volunteering: 74 percent of pre-retirees and 55 percent of retirees reported volunteering in the past year.
- Nearly all — 97 percent of pre-retirees and 93 percent of retirees — also donate money to at least one of the organizations at which they volunteer, the report found.



Chronicle of Philanthropy Study

How Do Donors Feel About A.I.?

- Nearly a third of respondents said they would be less likely to donate to charities that used artificial intelligence
- The results of a new study on donors and artificial intelligence are a signal for nonprofits to pause and consider whether their use of the technology could negatively impact trust, according to the report's authors.
- “The rate of A.I. adoption is profound,” said Nathan Chappell, study co-author. “Most, if not every, organization has taken some things for granted, specifically what donors think.”



Questions....?



GIVE TODAY!

cfgfw.org/support-our-work

Thank You.



**COMMUNITY
FOUNDATION**
OF GREATER FORT WAYNE