

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Camp:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  | **Culture of Philanthropy Assessment Tool - 2018** |  |
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|  |  | **Y/N** |
| **Donors** | |  |
| **1** | We engage with donors to better understand their giving experience, preferences, interests, etc. |  |
| **2** | We publicly recognize donors according to their preferences |  |
| **3** | Donors are invited to participate in program/org planning-related activities. |  |
| **4** | Donors do not tell us, "I only hear from you when you want my money." (aka ATM Syndrome) |  |
| **5** | We create and follow individual engagement plans for each "major donor" |  |
| **6** | Donors offer leads/introductions to prospective new donors |  |
| **7** | We steward our donors. First Time Donors receive a special welcome packet |  |
| **Alumni & Volunteers** | |  |
| **8** | We cite volunteerism as an important component of our mission and values |  |
| **9** | We actively seek alumni and volunteer input about their interests, experience, preferences |  |
| **10** | We calculate the value of volunteer work contributions |  |
| **11** | We involve alumni/volunteers into our program and event planning process |  |
| **12** | We offer a menu of volunteer engagement opportunities based on interest, availability & expertise |  |
| **13** | We have a board committee focused on alumni/volunteer engagement |  |
| **14** | We publicly recognize volunteer contributions (i.e. "time & talent") |  |
| **Board** | |  |
| **15** | Development is featured prominently (i.e. not last item) on all Board meeting agendas |  |
| **16** | Board members are personally, individually solicited for their gifts |  |
| **17** | Board members speak positively about fundraising and the importance/impact of philanthropy for our camp |  |
| **18** | The Board involves donors, volunteers, alumni in our strategic planning process |  |
| **19** | Every Board member performs specific activities supporting the Development Plan/Process - identifying, engaging, asking, thanking donors |  |
| **20** | We track and celebrate the value of board members' volunteer contributions |  |
| **21** | Board Development/Education includes donor/development related trainings |  |
| **Staff** | |  |
| **22** | We have professional fundraising/development/alumni relations staff |  |
| **23** | We encourage and celebrate staff charitable giving to camp |  |
| **24** | Our ED/CEO is deeply engaged in fundraising and models our organization's attitude/approach re: philanthropy |  |
| **25** | All job descriptions include duties that support philanthropy |  |
| **26** | Our professional development budget includes donor-focused trainings |  |
| **27** | Staff track and share stories of impact to be used for development purposes |  |
| **28** | Our staff do not refer to fundraising as a "necessary evil" or contrast it with our "real work" |  |
| **29** | Camp leaders and program staff regularly engage donors in programs and firsthand impact experiences - e.g. visits to camp |  |
| **Systems and Operations** | |  |
| **30** | Our camp mission, vision & values mention donors, alumni, and volunteers |  |
| **31** | We create and follow a development plan - including Stewardship ("Donor Love") - each year |  |
| **32** | We are trained in using a donor database (CRM), have standards for tracking giving history, relationships and communications preferences, and use data reports to guide our activities |  |
| **33** | We warmly acknowledge every gift to our camp |  |
| **34** | We know and track our year-to-year Donor Retention Rate |  |
| **35** | We generate gift/pledge Thank Yous within 3 days |  |
| **36** | Our pledge reminders do not look or sound like "bills" |  |
| **37** | We report to donors on previous gift impacts before asking again |  |
| **38** | We calculate the Lifetime Value (LTV) of a donor |  |
| **Program** | |  |
| **39** | We offer programming to teach campers about their own potential as philanthropists |  |
| **40** | We teach campers and summer staff about the important role of philanthropy to our camp and their camp experience |  |