

## Camp Community Roles for Supporting a Culture of Philanthropy

|  | Donor Identification  | Donor Research   | Cultivation of Donors  | Solicitation of Donors   | Stewardship of Donors  |
|--|---|--|--|--|--|
| <b>Board Members</b>   | <ul style="list-style-type: none"> <li>-Give names/info on prospective donors they know in key locations. Be willing to serve as an entry point into camp for them. Would you consider bringing your guest to tour camp?</li> <li>-Share mission moments of camp (stories that demonstrate the impact of your programs) to your greater community (through social media, synagogue, other public gatherings). If there is interest, further connect with those individuals.</li> <li>-Consider taking on a small portfolio of major donors who you will cultivate, ask, and steward.</li> </ul> | <ul style="list-style-type: none"> <li>-Screen other prospect names (new and lapsed donors) to see if you have existing connections to any contacts.</li> <li>-Help development staff to ask current major donors as to what they like/would like in terms of cultivation and stewardship.</li> <li>-Meet with development staff to share what you know about current donors.</li> <li>-If you have the skill set, offer to do on-line donor research with development staff.</li> </ul> | <ul style="list-style-type: none"> <li>-Bring friends to tour camp</li> <li>-Share your passion for camp at donor gatherings</li> <li>-Use social media to share your mission moments about camp (stories that demonstrate the impact of your programs).</li> <li>-Invite friends to fundraising event</li> <li>-Host and attend gatherings such as virtual and face to face house parties. Consider whole table gatherings.</li> <li>-Make phone calls to contacts before events to remind them; send camp materials.</li> <li>-Make phone calls to contacts (lapsed donors/major donor prospects) to talk about camp plans, ask how they want to be involved.</li> <li>-Networking!</li> </ul> | <ul style="list-style-type: none"> <li>-Make a personal gift.</li> <li>-For those that are comfortable asking, either participate in 1:1 asks or do public ask at event.</li> <li>-100% participation in making any size gift each year.</li> <li>-Accompany development staff on select number of solicitation meetings with or without being the person to ask.</li> <li>-Help with social media on Giving Tuesday and during other camp giving days or online campaigns.</li> </ul>                         | <ul style="list-style-type: none"> <li>-Make phone calls or write personalized cards to select donors after gift/event to say thank you or get feedback on the event or their involvement with camp. Goal: they understand they made a difference with their giving.</li> <li>-Pass on photos/videos/stories of camp in action to individuals within your 'portfolio.'</li> <li>-Personal visits with individuals if gift is particularly meaningful.</li> <li>-Create a board thank a thon: Everyone makes calls together one evening, ending with a fun gathering (pizza?). You can do this in person or virtually.</li> </ul> |
| <b>Development Committee</b><br><br><i>All Board Member Responsibilities above PLUS...</i> | <ul style="list-style-type: none"> <li>-Ask board/staff/key donors for names of contacts.</li> <li>-Consider taking on a small portfolio of major donors who you will cultivate, ask and steward.</li> </ul>  | <ul style="list-style-type: none"> <li>-Help to coordinate screening of names (new and lapsed donors) with development staff.</li> <li>-Help develop plan with development staff for holding house parties in three new locations this year.</li> </ul>  | <ul style="list-style-type: none"> <li>-Invite individuals to fundraising event.</li> <li>-Support/host/plan events like fundraising events, house parties, and whole table gatherings.</li> </ul>   | <ul style="list-style-type: none"> <li>- Make phone calls to lapsed donors/major donor prospects to share our work and ask for a contribution.</li> <li>-All options above.</li> </ul>   | <ul style="list-style-type: none"> <li>-Make phone calls or write personalized cards to select donors after gift/event to say thank you or get feedback on the event or their involvement with camp. Goal: they understand they made a difference with their giving.</li> </ul>  |
| <b>Alumni</b>  | <ul style="list-style-type: none"> <li>-Give names/info on prospects you know in key locations. Use your social network to connect people to camp.</li> </ul>   | <ul style="list-style-type: none"> <li>-Help development with donor research if it's in your skill set.</li> <li>- Use your network to enhance list of prospects, then learn more about peers.</li> </ul>  | <ul style="list-style-type: none"> <li>-Invite individuals to fundraising event.</li> <li>-Host house parties or help your contacts host.</li> <li>- Establish ways to connect people more deeply to camp. Are there things you need? Skills, wisdom, items?</li> </ul>  | <ul style="list-style-type: none"> <li>- Make a personal gift.</li> <li>- Use your online social media to connect people to Giving Tuesday campaign.</li> </ul>  | <ul style="list-style-type: none"> <li>-Create a 'class' thank a thon: Everyone makes calls together one evening, ending with a fun gathering (pizza?). You can do this in person or virtually.</li> </ul>   |
| <b>Executive Director</b>  | <ul style="list-style-type: none"> <li>-Give names/info on prospects in key locations.</li> <li>-Identify Board prospects, with development in mind.</li> </ul>   | <ul style="list-style-type: none"> <li>-Screen prospect names (new and lapsed donors) and suggest contacts.</li> </ul>   | <ul style="list-style-type: none"> <li>-Support or host fundraising event.</li> <li>-Attend house parties.</li> <li>-Speak at other events such as web-based seminars, teleconferences, panel discussions, or special talks.</li> <li>-One-on-one phone calls/meetings &amp; correspondence with key donors.</li> </ul>  | <ul style="list-style-type: none"> <li>- Make a personal gift.</li> <li>-Accompany development staff on a select number of solicitation meetings, at times doing the "ask" and at times not.</li> </ul>  | <ul style="list-style-type: none"> <li>-Make phone calls or write personalized cards to select donors after gift/event to say thank you or get feedback on the event or their involvement with camp. Goal: they understand they made a difference with their giving.</li> <li>-Hand-written note to select individuals after gift/event.</li> </ul>  |
| <b>Development Staff</b>   | <ul style="list-style-type: none"> <li>-Ask Board/staff /key donors for names of contacts.</li> <li>-Attend workshops/conferences with other staff when opportunity presents of meeting/networking with donors &amp; prospects.</li> </ul>  | <ul style="list-style-type: none"> <li>-Coordinate screening of prospect names.</li> <li>-Conduct further research into prospect connections and capacity to give; develop profiles on donors.</li> <li>-Survey current major donors as to what the like/would like in terms of cultivation and stewardship from us.</li> <li>-Develop database system for storing all biographical and personal information on donors.</li> </ul>   | <ul style="list-style-type: none"> <li>-Develop &amp; distribute material (case statement, planned giving, Investor's Circle, strategic plan, newsletter, House Party Toolkit) for use in meetings &amp; events.</li> <li>-Plan and execute events like Fundraising Events, House Parties.</li> <li>-Develop individual plans for top donors &amp; prospects.</li> <li>-Plan targeted direct mail correspondence.</li> <li>-Develop/present opportunities for donor/prospect involvement in camp.</li> </ul>   | <ul style="list-style-type: none"> <li>- Make a personal gift.</li> <li>-Solicitation at events like fundraising events, house parties.</li> <li>-One-on-one solicitations or attending solicitation meetings of all major donors.</li> <li>-Direct mail or phone solicitation of major donor prospects and major donors who prefer this method.</li> <li>-Direct online campaigns, including giving days, email solicitations, and social media solicitations.</li> <li>-Further develop web site.</li> </ul> | <ul style="list-style-type: none"> <li>-Develop gift acknowledgement policy.</li> <li>-Write thank yous for all gifts.</li> <li>-Make phone calls or write personalized cards to select donors after gift/event to say thank you or get feedback on the event or their involvement with camp. Goal: they understand they made a difference with their giving.</li> <li>-Phone call/correspondence with those who were unable to attend event.</li> <li>-Develop individual plan for thanks/recognition/next steps for top donors.</li> </ul>   |
| <b>Other Staff</b>   | <ul style="list-style-type: none"> <li>-Have antennae up, as all people who use our services are potential donors; communicate with development staff/development committee.</li> <li>-Generate list of people who may want to be more involved.</li> </ul>   |  | <ul style="list-style-type: none"> <li>-Gather and share Mission Moments (stories that demonstrate the impact of your programs).</li> <li>- Attend/host fundraising events – share your mission moments.</li> <li>-Attend House Parties or other events, as needed.</li> </ul>   | <ul style="list-style-type: none"> <li>- Make a personal gift.</li> <li>-aiming for 100% participation for all staff.</li> </ul>   | <ul style="list-style-type: none"> <li>-Make phone calls to individuals you invited after events to say thank you or get feedback on the event or their involvement with camp.</li> </ul>  |

## Camp Community Roles for Supporting a Culture of Philanthropy

\*Definition of terms used in the solicitation process:

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|----------------|--|
| Identification | Person is chosen, suggested, somehow gets on our list.   |
| ▼              |  |
| Research       | We find out more information on the person, biographical, financial, personal so that we can determine capacity (ability to give a gift, i.e. wealth) and inclination (how interested a person is in us, commitment, involvement) and from there, create a plan.   |
| ▼              |  |
| Cultivation    | Development of the relationship before asking for a gift, the “getting to know you” phase. Always includes giving the supporter more information on camp and may include inviting to tour camp, attending a house party, participating in a seminar, attending fundraising event or receiving a personal visit.  |
| ▼              |  |
| Solicitation   | The ask. Usually, a personal visit or phone call. It could also be en masse at the fundraising event or with social media for an online giving campaign such as Giving Tuesday.  |
| ▼              |  |
| Stewardship    | Nurturing of the relationship after the gift. Always includes a thank you for their gift and showing that their gift <i>made a difference</i> . It may include inviting to a stewardship house party, participating in a seminar, attending a special dinner, receiving a personal phone call, being honored in a newsletter, receiving special publications/ information. |