

# Development at the Core

## Successful Fundraising through Organizational Transformation

*Scripting Our Future*

The 38<sup>th</sup> Annual Conference of the  
Association of Jewish Family & Children's Agencies  
Los Angeles, CA



# Getting to Know You

- Your name, name of agency, name of community
- Your greatest success in fundraising
- Expectations

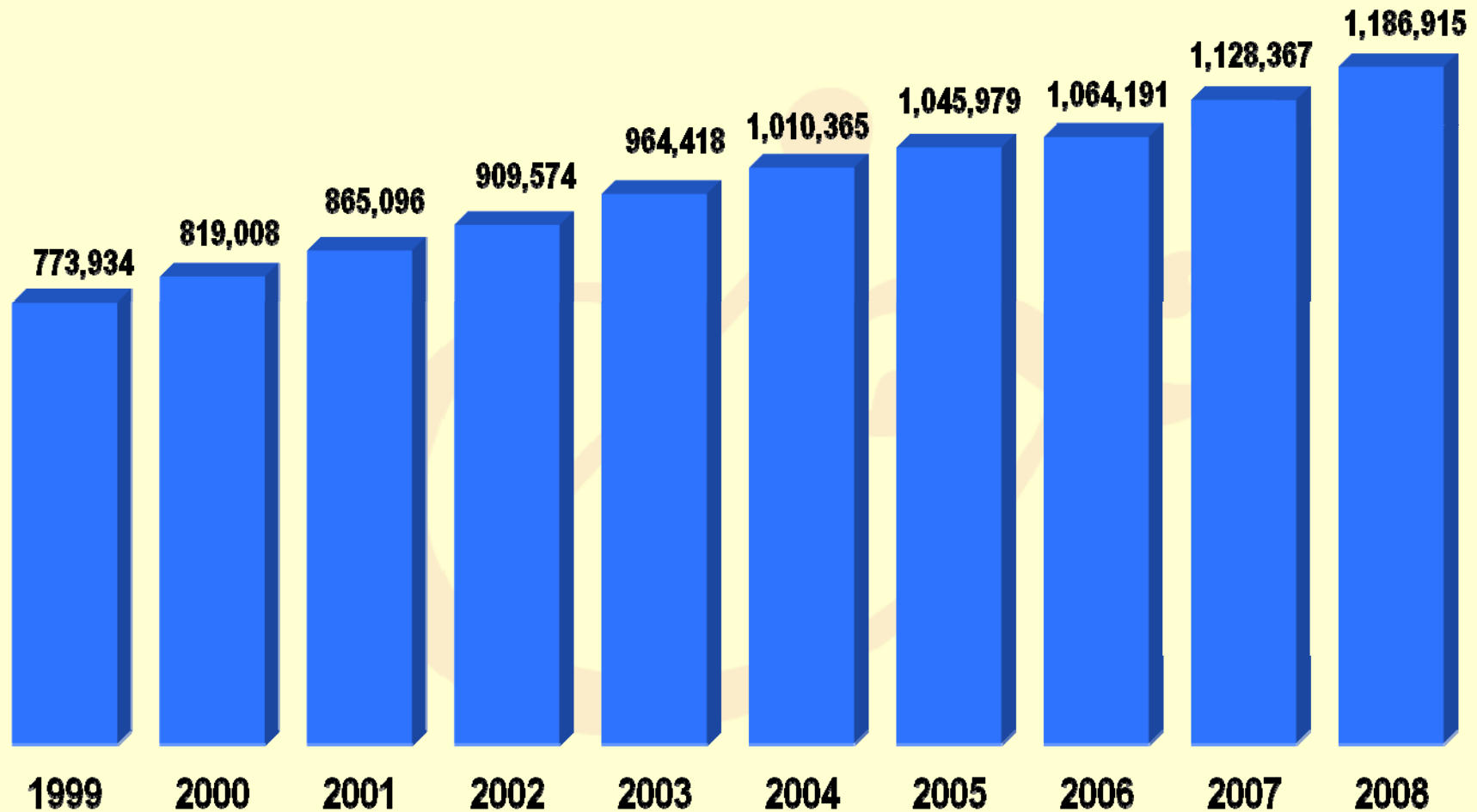


# Getting to Know You

- What are the human and financial resources devoted to:
  - Agency
  - The development function
- What is the percentage of agency operating expenses derived from philanthropic revenue?

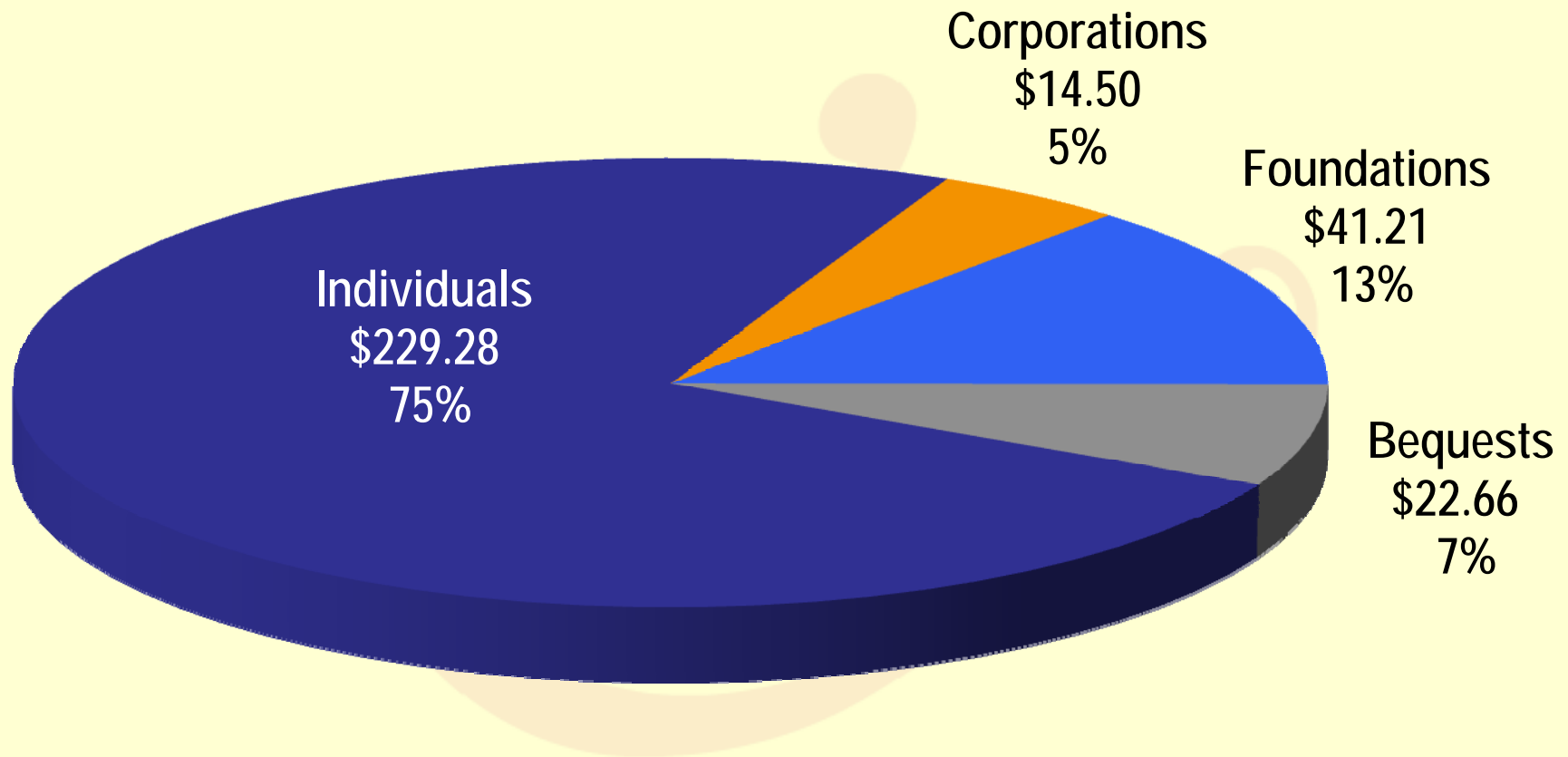
# The State of Philanthropy in America Today: A View from the Field

# The number of 501(c)(3) organizations 1999–2008



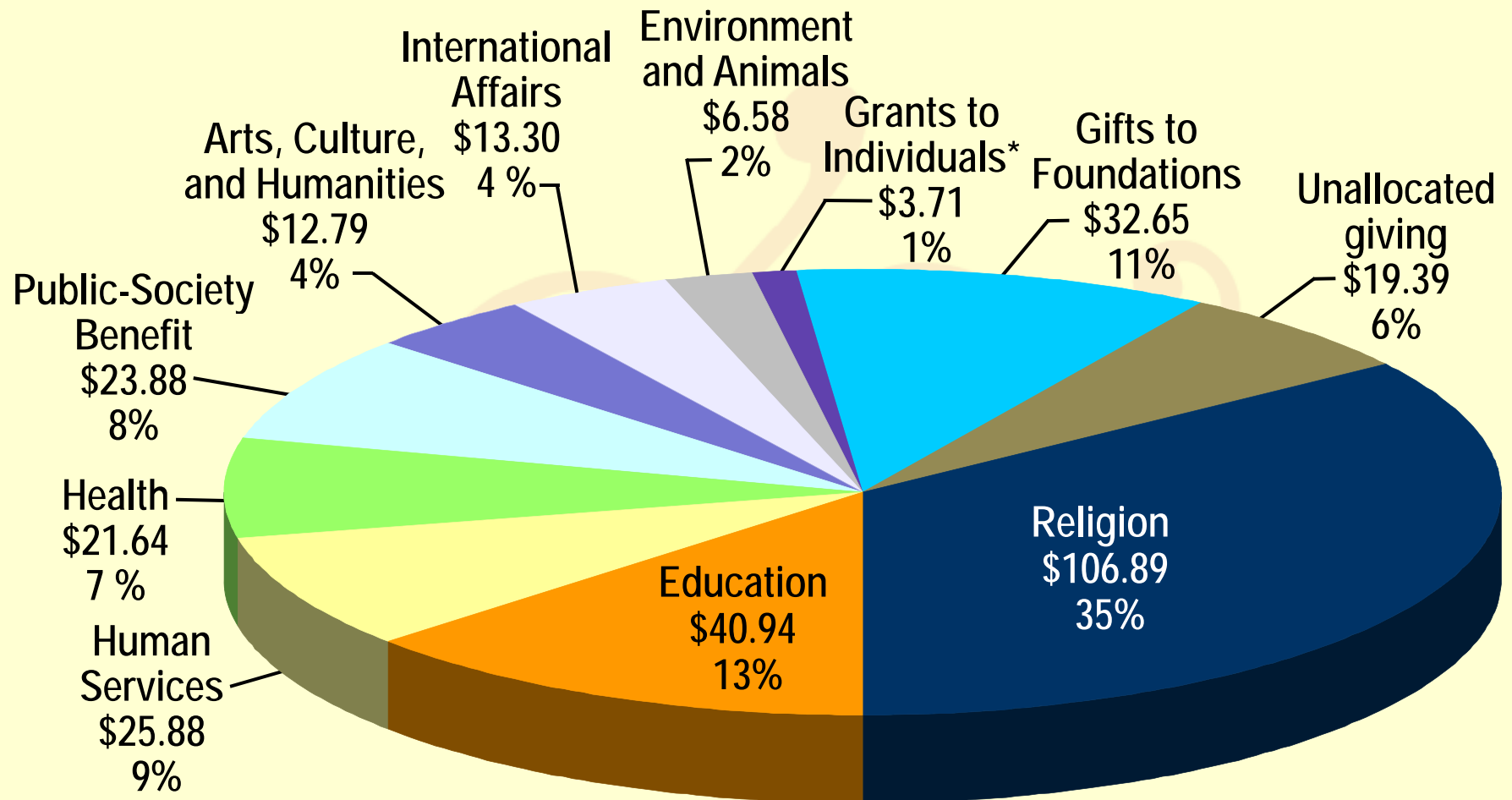
# 2008 charitable giving

Total = \$307.65 billion (\$ in billions)



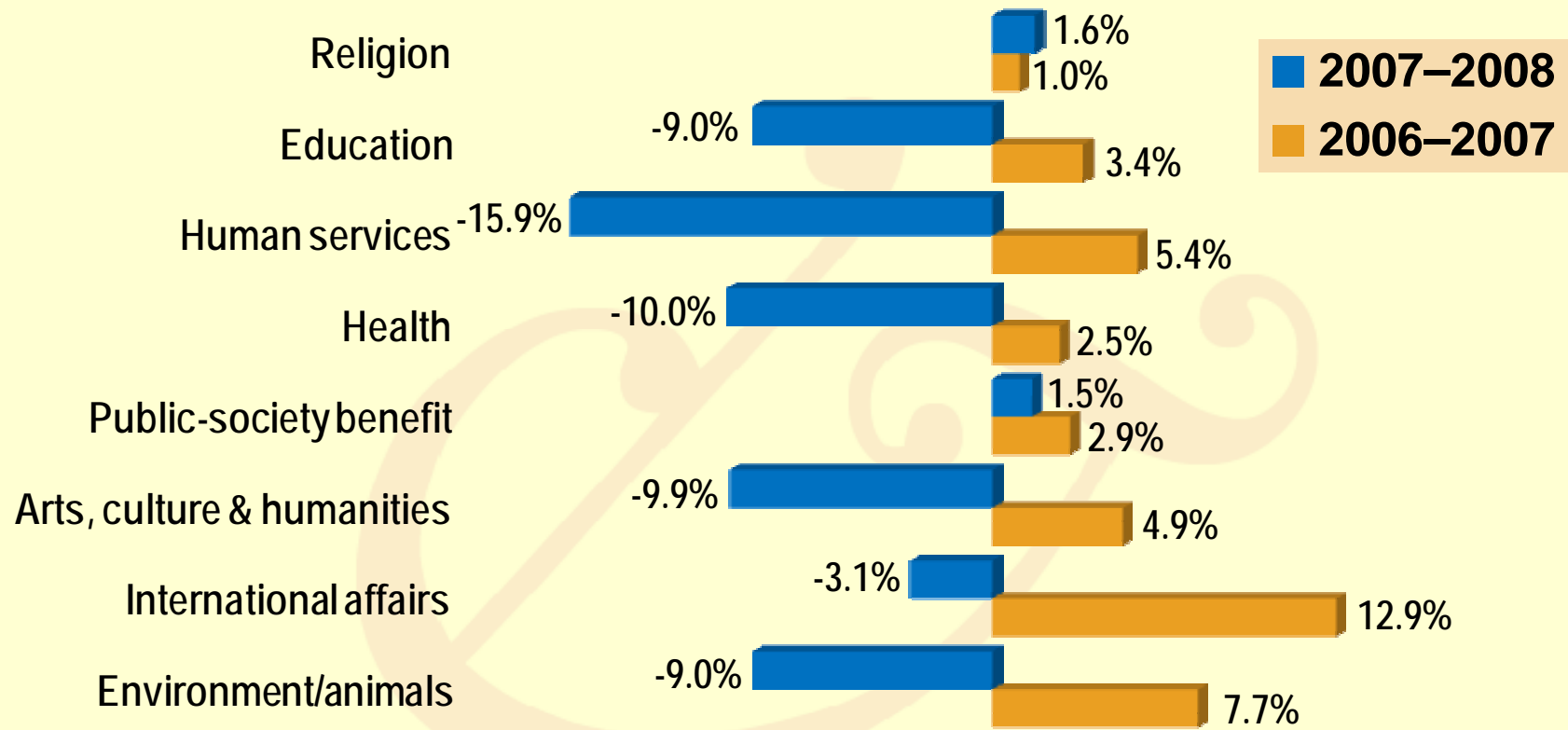
# Types of recipients of contributions, 2008

Total = \$307.65 billion (\$ in billions)



\*Foundation grants awarded to individuals

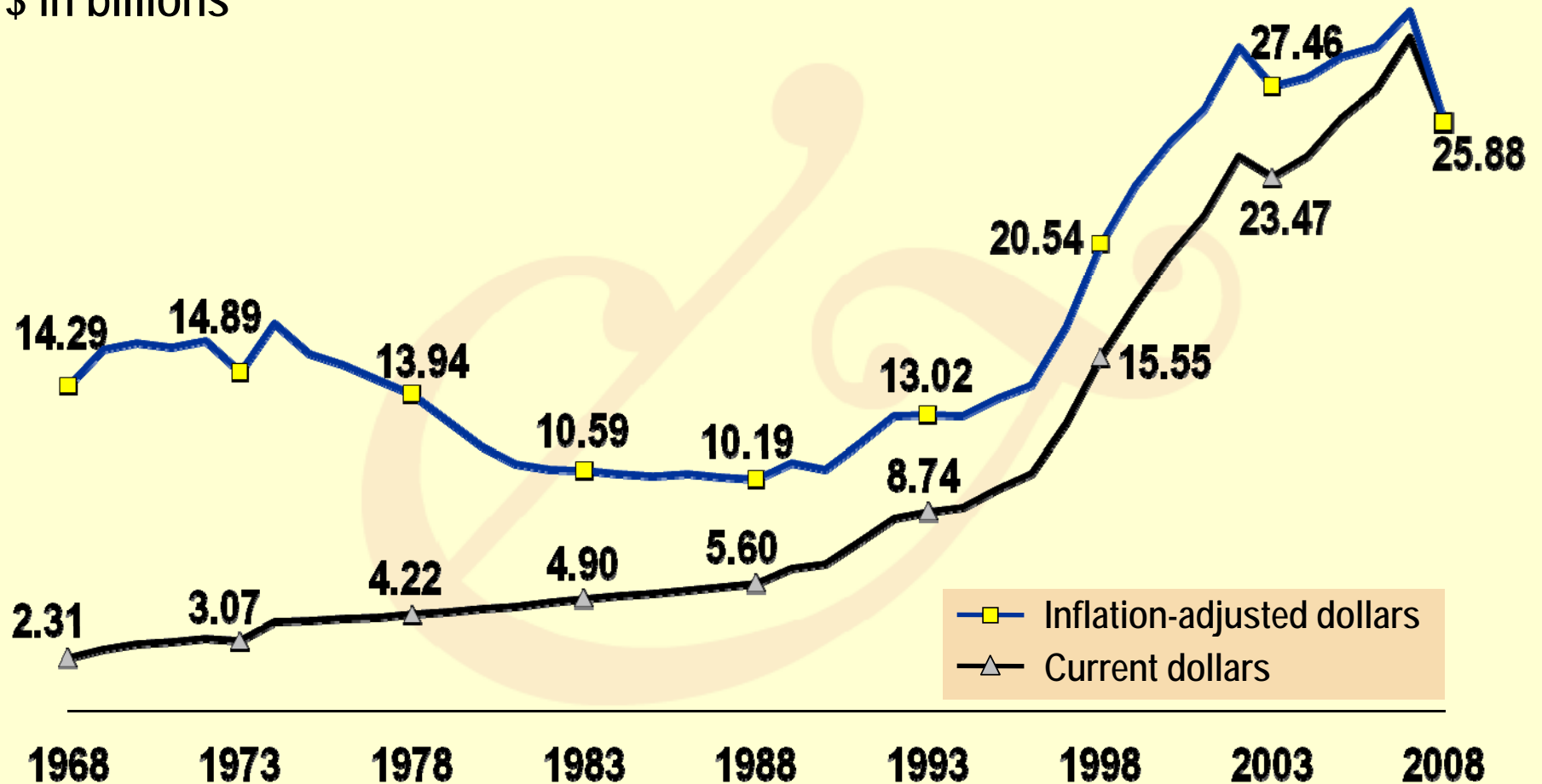
# Changes in giving by recipient organization



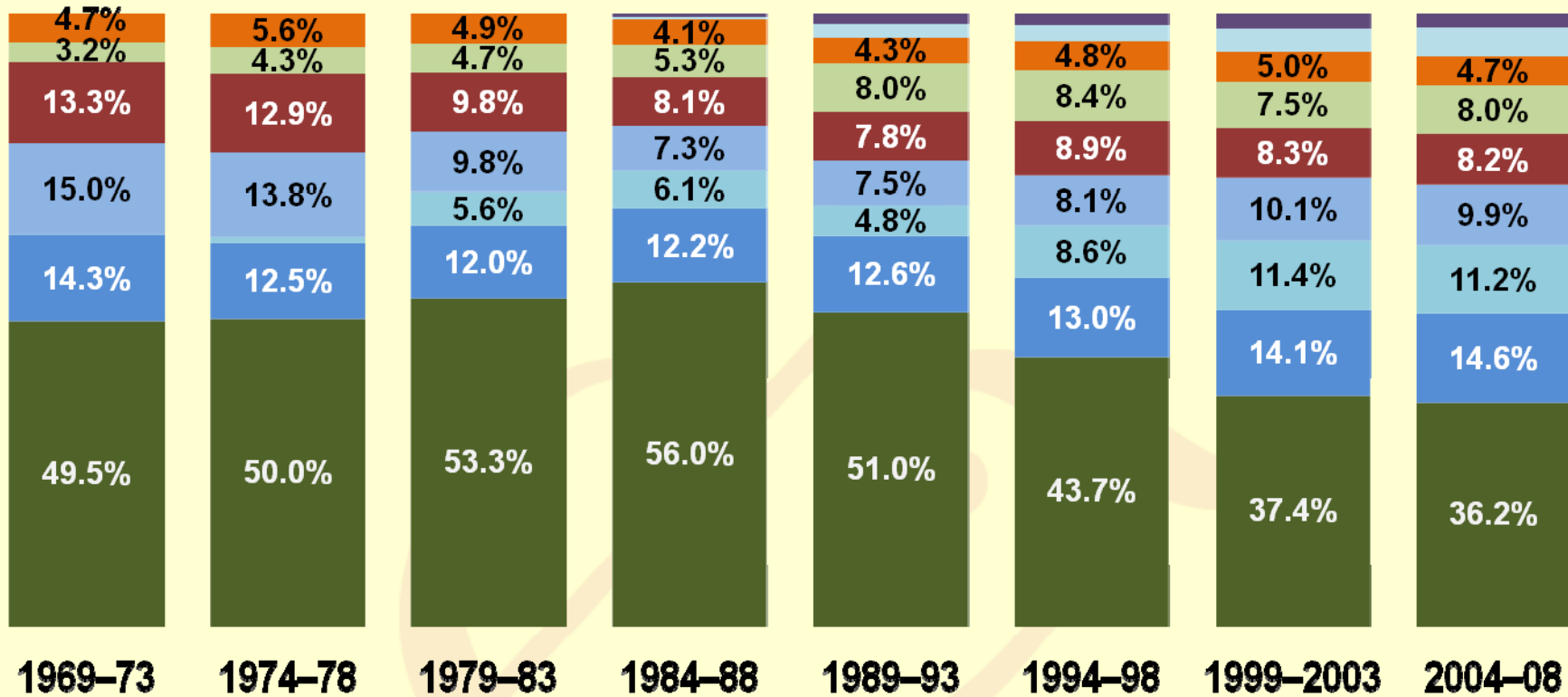
Percentage Change From Previous Year

# Giving to human services, 1968–2008

\$ in billions



# Giving by type of recipient as a percentage of total giving

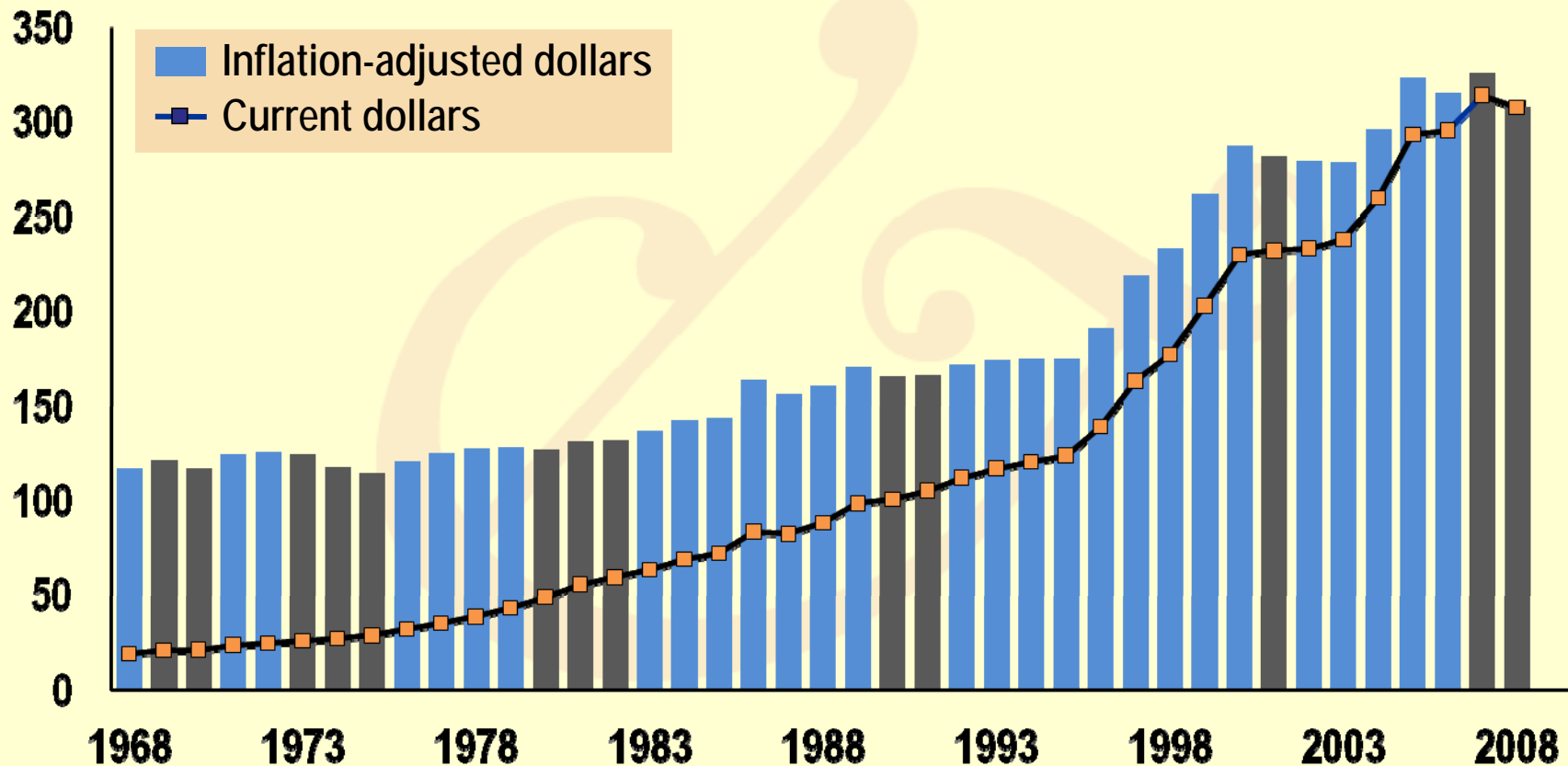


Data begin in 1978 for foundations and in 1987 for environment/animals and international affairs.



# Total giving, 1968-2008

\$ in billions



Recessions in dark gray: 1969-70; 1973-75; 1980; 1981-82; 1990-91; 2001; 2007-2008

# How Jews see fund development

# Jewish View of Fund Development

Based on Total Dollars of All Gifts of \$1M or More Made by Jews



Tobin, *Mega-Gifts in Jewish Philanthropy*, 2007

# JFS of the North Shore Before Development at the Core

- **Development planning**
- **Donor support represents 19% of all revenue**
- **There was no one else to do it**

# Development at the Core

- Developing the Developers—The State of the Field <http://www.brandeis.edu/fbi/pdfs/DevelopingtheDevelopers-2007.pdf>
- Professional Development vs. Organizational/Cultural Change
- Leveraging 20+ years of one-on-one consulting to deliver programs to agencies in a cost-effective way

# Development at the Core

- I. Organizational and development assessment
- II. Role of leadership
- III. Major gifts management
- IV. Creating a unique value proposition = the case for support
- V. Developing a fundraising plan

# JFS of the North Shore

## The Organizational And Development Assessment

- Identified and engaged leadership
- Allowed for a climate of “painful honesty”
- Uncovered weaknesses in fundamentals
- Highlighted organizational strengths
- Created possibilities for what could be done

# JFS of the North Shore

## The Organizational And Development Assessment

- **Benchmarked JFS against cohort**
- **Highlighted how much we have accomplished with so little**
- **Clarified priorities and focus**
- **Implied solutions**

# JFS of the North Shore

## The Case Statement

- Crystallized historical ability to adapt
- Sharpened message about who we are
- Provided a compelling Jewish story
- Explained why we need to raise money
- Articulated our strategy

# JFS of the North Shore Strategic Development Plan

- Integrates community current realities
- Separates JFS from the pack
- Sharpens our
  - brand
  - goals
  - tactics

# JFS of the North Shore Execution And Capacity Building

- **Leadership recruitment and engagement**
- **Building staffing capacity**
- **Improving development systems**

# JFS of the North Shore

## The Culture of Development At The Core

- Greater appreciation of what we do
- Engagement of staff, management and lay leadership
- Emphasis on communication and messaging

# Enduring Values

אלו דברים שאין להם שעור:  
שאדם אוכל פרותיהם בעולם הזה  
והקרן קימת לו לעולם הבא: ואלו הן--

“These are the obligations without  
measure, whose reward, too, is  
without measure:

# Enduring Values

To honor father and mother;

to perform acts of love and kindness;

to attend the house of study daily;

to welcome the stranger;

to visit the sick;

to rejoice with bride and groom;

to console the bereaved;

to pray with sincerity;

to make peace when there is strife.

כבוד אב ואם

וגמילות חסדים

והשכמת בית המדרש

שחרית וערבית

והכנסת אורחים

ובקור חולים

והכנסת כלה

ולוית המת

ועיון תפלה

והבאת שלום בין אדם לחברו

# Enduring Values

ותלמוד תורה כנגד כלם

And the study of Torah is equal to them all,  
because it leads to them all.”

*--Shabbat, 127a*

# Enduring Values

אמר רבי יוסי יהא חלקי מגבאי  
צדקה ולא ממחלקי צדקה

Rabbi Yossi said:

May my portion be with those who collect *tzedakah* and not with those who only distribute it.

--*Shabbat 118b*

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