



FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

DEVELOPING AND SUSTAINING A CULTURE OF PHILANTHROPY AT A LOCAL YMCA

PROJECT SITE INFORMATION

Y Name:

CEO:

Project Contact Name and Position:

CULTURE OF PHILANTHROPY DEFINITION: Organizational values and practices that support and nurture financial development within an organization.

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CULTURE OF PHILANTHROPY

In 2013, CompassPoint and the Evelyn and Walter Haas, Jr. Fund published, “UnderDeveloped, A National Study of Challenges Facing Nonprofit Fundraising”. The groundbreaking study revealed that many nonprofit organizations are stuck in a vicious cycle that threatens their ability to raise the resources they need to succeed.

Among other things, the study points out that all too often, nonprofit organizations pin their hopes and dreams for fundraising on one person – namely the Development Director. The survey reveals that nonprofits cannot just hire their way out of the problems they face. Organizations need to make fundamental changes in the way they lead and resource fund development in order to create the cultures and systems that support fundraising success. Fundraising can’t be a priority for just one individual. It has to be a priority, and a shared responsibility, for the board, senior leadership, and staff alike.

YMCA leaders saw the same things happening at many local Ys. They used the concept of a pilot project to recruit a group of YMCAs in early 2014 collectively working on:

PROJECT PURPOSE: Identify success indicator baseline metrics and practices that should be implemented to help monitor the strength of a Y’s culture of philanthropy.

PROJECT DESCRIPTION: Utilizing baseline data results from the fundraising fitness test, each pilot Y will develop plans to develop and implement best practice strategies to increase specific metrics as identified for every level, as appropriate.

The results of their work led to the creation of “Developing and Sustaining a Culture of Philanthropy at a Local YMCA”. The intent of this resource is for any Y, regardless of where they are at on their philanthropic journey, to use this tool to begin implementation of a Culture of Philanthropy or build upon the culture they already have in place.

HOW TO USE THIS RESOURCE

Realizing that all Ys start from a different place in this process, this resource is designed to help leadership staff and volunteers identify their Y’s current status and opportunities for development. Practices and metrics are built upon the foundational level that all Ys should implement. Each subsequent level builds upon the fundraising practices and metrics included in the previous level.

To determine where your Y is currently, review and fill in information for all levels, as many Ys will have completed part of the succeeding levels. Utilize this information on an annual basis with a team of staff and volunteers to determine your strategies for continuing to build for success and sustainability.

To complete the metrics portion of this resource it is recommended that you utilize the Fundraising Fitness Test (FFT) tool to obtain the data being tracked. The FFT is an internationally acclaimed tool designed by the [Fundraising Effective Project](#) (FEP). This tool generates 150+ fundraising performance metrics from just four gift transaction data fields: Donor ID, Gift Date, Gift Amount, and Fundraising Identifier (e.g. Annual Campaign, Special Event, Capital Campaign, etc.). These four data points may easily be extracted for every gift in each Y’s donor database and can be submitted electronically to Y-USA to be processed, with the results reported back to you. The results from this tool can greatly strengthen your financial development program. If you are interested in more information about the FFT, please take a look at the brief overview on [Exchange](#). You can also contact Y-USA at Barbette.Alexander@ymca.net for any questions or discussion about using this tool.

GLOSSARY OF TERMS

AFP (the Association of Fundraising Professionals) - The Association of Fundraising Professionals, an association of fundraising professionals throughout the world, advances philanthropy by enabling people and organizations to practice ethical and effective fundraising.

AFP Fundraising Fitness Test - Downloadable Excel-based analysis that allows nonprofits to measure and evaluate their fundraising programs against a set of over 100 performance indicators by five donor giving levels.

Case for Support - A comprehensive document that describes the need and purpose for asking the community members to make donations to the organization. The case for support details how the Y benefits the community by addressing community needs and contains all of the vital information a prospective donor may need or want to know about the Y in a single document.

Communication Plan - A communication plan is a road map with strategies, timeline, and accountabilities for getting your message across to your internal and external audiences.

Communication Strategies - Strategies designed to get your message out utilizing multiple available communication channels to communicate with internal and external audiences, such as a website; social media; emails, TV, radio, and print media; billboards and other signage; and face-to-face meetings and events.

Donor Cultivation - A term used in fundraising to describe activities designed to develop a deeper relationship between a current or prospective donor and the organization.

Donor Prospect Identification - Identification of any potential donor for the organization.

Donor Qualification - A process by which the linkages, giving ability, and interests of a donor prospect have been confirmed.

Fiscal Year - The time between one yearly settlement of financial accounts and another. Regulatory laws regarding accounting and taxation require such reports once per 12- month period.

Fund Raising Management Systems - Systems (often computer software) used to monitor fundraising recruitment and solicitation results of individual volunteer campaigners, committees, and teams, along with the ability to generate reports for analyzing campaign results to guide decision making.

Donor Tracking Systems - Software for tracking donors, prospects, and members, incorporating procedures for managing gifts, pledges, and payments.

Gift Acceptance Policies - Rules and regulations developed by a donee organization to determine which types of gifts should or should not be accepted.

Integrated Campaigns - Often called comprehensive campaigns, these focus an organization's energies into one campaign with multiple goals and revenue sources, for the requests to a donor may include annual, capital, and endowment needs. It reduces confusion among prospective donors, allows them to make a single decision on how to support the organization's diverse needs, and reduces duplication of donor visits on the part of organization.

Major Gift Solicitation Component of Annual Campaign - The component of the annual campaign that focuses on asking for gifts of \$1,000 and above from members and the community at large.

MOVEs Management System – Refers to the process by which a prospective donor is moved from cultivation to solicitation. “Moves” are the actions an organization takes to bring in donors, establish relationships, and renew contributions.

Resource Development Plan – Describes in detail the purposes and uses for which philanthropic support will be needed in order to achieve the Strategic Plan’s goals/strategies (along with the philanthropic needs of the Y’s annual operational plan). The plan also identifies the methods that will be used to secure that contributed support.

Solicitation – A request, preferably in person, for a monetary gift to help fund the Y’s ability to deliver programs that impact community issues.

Stewardship – The effective management of charitable gifts through acknowledgment, recognition, reporting, and donor engagement.

FUNDRAISING FITNESS TEST TERMS

New Donor Retention – The number of last year’s new donors who gave again this year, divided by all of last year’s new donors.

Repeat Donor Retention – The number of last year’s donors who renewed their gift this year (excluding new donors last year), divided by all donors who gave last year (also excluding new donors last year).

Overall Donor Retention, Donor Retention Rate – The number of last year’s donors who gave again this year, divided by total number of donors last year.

Distribution of Donors – New, Recaptured, Upgraded, Same and Downgraded Donors/Gifts

New Donors – Donors who never gave prior to this year.

Recaptured Donors – Previously lapsed donors who gave again this year.

Repeat Donors – Donors who gave last year and in one or more prior years and who gave again this year; also known as upgraded, same and downgraded combined.

Upgraded Donors – Donors who gave more this year than last year.

Same Donors – Donors who gave the same amount this year as last year.

Downgraded Donors – Donors who gave less this year than last year.

Lapsed New Donors – First-time donors last year who did not give this year.

Lapsed Repeat Donors – Donors who gave last year and in one or more/or prior years but not this year.

CONDITIONS THAT DEVELOP, SUPPORT, AND MAINTAIN A HEALTHY CULTURE OF PHILANTHROPY¹

Leadership is committed, aligned, and personally involved in fundraising.

All levels of the organization are involved and held responsible for relationship building.

Everyone (across all positions) promotes philanthropy and can articulate the case for giving.

Financial Development is viewed and valued as a mission-aligned program of the organization and adequately resourced for success.

Organizational systems are established to support donors having a positive experience.

Philanthropy program has a strategic long-term focus with measurable goals.

¹ Conditions are adapted from the definition of a Culture of Philanthropy from Bell, Jeanne and Marla Cornelius, *UnderDeveloped: A National Study of Challenges Facing Nonprofit Fundraising* (San Francisco, CA: CompassPoint Nonprofit Services and the Evelyn and Walter Haas, Jr. Fund, 2013).

CULTURE OF PHILANTHROPY ASSESSMENT RESOURCE

PART I

BENCHMARK PRACTICES 7

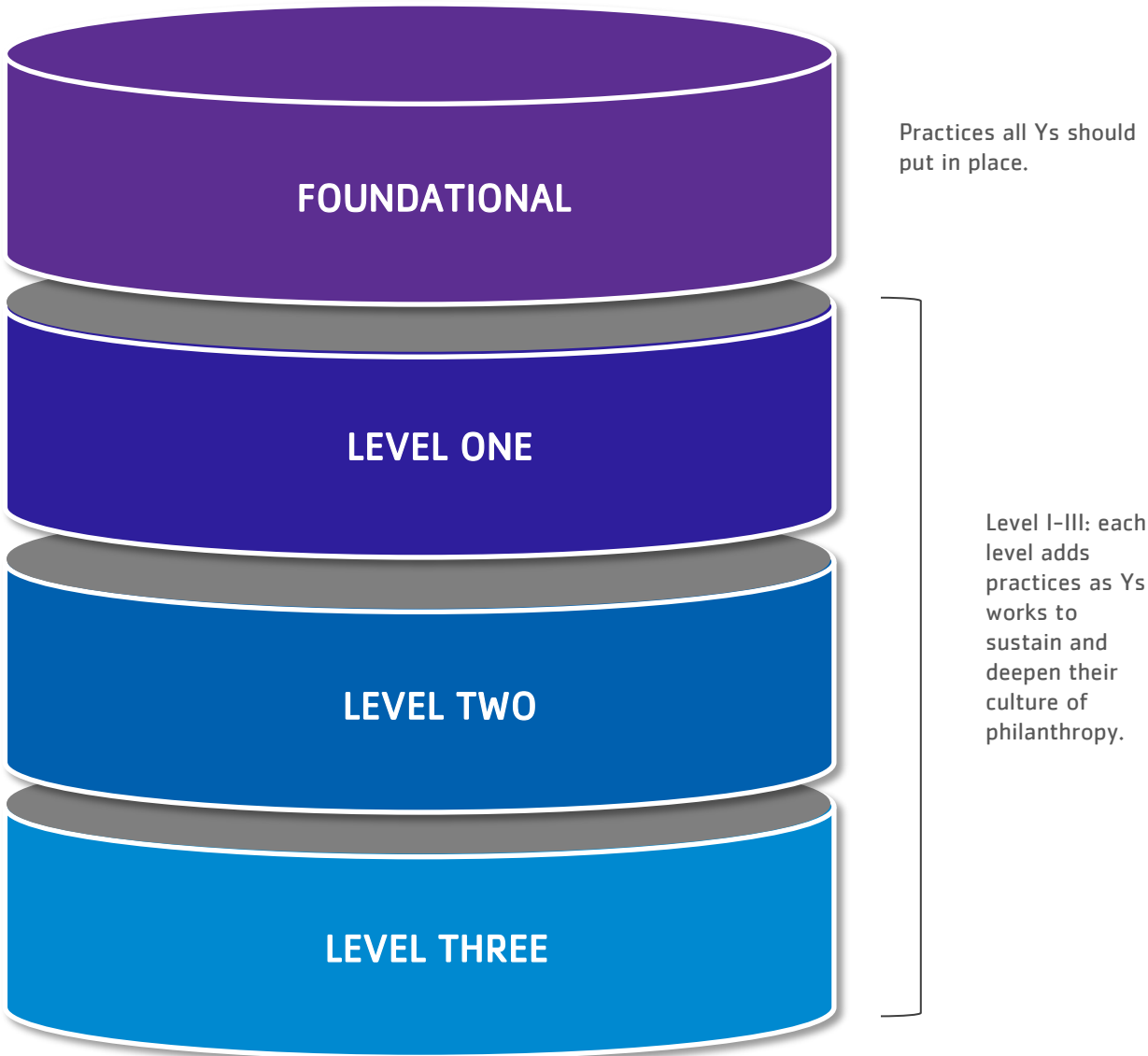
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BENCHMARK PRACTICES

TO BUILD A HEALTHY CULTURE OF PHILANTHROPY

Realizing that all Ys start from different places in this process, the pilot project is designed to test the foundational plus three additional levels of practices utilized by YMCAs for deepening a culture of philanthropy.

Levels of practices are built upon the foundational level that all Ys should implement. Each subsequent level builds upon the fundraising practices included in the previous level.



FOUNDATIONAL PRACTICE BENCHMARKS

Table 1. Financial Development Practice Benchmark Checklist

Step 1: Answer each question with a “yes”, “no”, or “in progress”

Step 2: Discuss what action is needed to turn a “no” into a “yes” or an explanation for incomplete implementation of a benchmark.

In place and updated annually as needed	Yes/No	In Progress	Action needed or explanation
Written Organizational Case for Support			
Communication strategies are implemented to articulate the community impact of a charitable gift with the outcome of motivating increased giving.			
Appropriate staff and volunteer leadership positions are dedicated to supporting the achievement of the association philanthropic goals.			
All board members (governing and branch) make a meaningful charitable gift annually.			
Appropriate training and coaching opportunities for staff and volunteers are available to meet the association philanthropic goals.			
Staff with financial development responsibilities have annual opportunities to increase skills and competencies needed through formal education, networking with peers, and professional certification.			
Appropriate funds are dedicated to carry out strategies to meet the association philanthropic goals.			
Appropriate donation tracking and fundraising management systems are available to meet the association philanthropic goals.			

LEVEL ONE PRACTICE BENCHMARKS

(In addition to Foundational Practice Benchmarks)

Table 1. Financial Development Practice Benchmark Checklist

Step 1: Answer each question with a “yes”, “no”, or “in progress”

Step 2: Discuss what action is needed to turn a “no” into a “yes” or an explanation for incomplete implementation of a benchmark.

In place and updated annually as needed	Yes/No	In Progress	Action needed or explanation
Organizational Case for Support drives philanthropic messages for campaign and project funding in case statements (i.e. print, media, donor conversations, and website).			
Effective communication plan in place that both elevates the cause of the Y and communicates the impact donor’s gifts make.			
Association has intentional strategies for staff, donor, and member engagement designed to bring each audience closer to the Y cause. (i.e. living our cause activities)			
At a minimum, all board members (governing and branch boards) are asked personally by a peer to make an annual charitable gift.			
At a minimum, all currently employed full-time staff are personally asked by a peer or volunteer (not a direct supervisor) to make an annual contribution.			
Staff who make a charitable gift are given donor recognition and stewardship as any other Y donor.			
The Y implements intentional strategies that focus on donor identification, cultivation, and stewardship year-round.			
The number of volunteers needed (not including staff) are recruited to achieve philanthropic goals and each receives a written position description defining responsibilities.			
Gift Acceptance Policies adopted by Board of Directors and Gift Acceptance Procedures are in place.			

LEVEL ONE PRACTICE BENCHMARKS – continued

(In addition to Foundational Practice Benchmarks)

Table 1. Financial Development Practice Benchmark Checklist

Step 1: Answer each question with a “yes”, “no”, or “in progress”

Step 2: Discuss what action is needed to turn a “no” into a “yes” or an explanation for incomplete implementation of a benchmark.

In place and updated annually as needed	Yes/No	In Progress	Action needed or explanation
Y adopts the “Donor Bill of Rights” (prepared by the AFP) to guide work with donors.			
Information and Technology Resources in place to support donors having a positive giving experience.			
Donors have opportunities to designate their gifts (to broad areas of focus).			
At end of fiscal year, AFP Fundraising Fitness Test is conducted, and results are used to determine where strategies should be implemented to increase future results.			

LEVEL TWO PRACTICE BENCHMARKS

(In addition to Foundational and Level I Practice Benchmarks)

Table 1. Financial Development Practice Benchmark Checklist

Step 1: Answer each question with a “yes”, “no”, or “in progress”

Step 2: Discuss what action is needed to turn a “no” into a “yes” or an explanation for incomplete implementation of a benchmark.

In place and updated annually as needed	Yes/No	In Progress	Action needed or explanation
A written philanthropic communication plan is developed and implemented annually.			
Communication strategy articulates impact a charitable gift can make.			
100 percent of currently employed full-time and part-time staff have the opportunity to make a gift, are personally asked by a peer or volunteer (not a direct supervisor), and stewarded as all donors would be.			
Financial Development Committee of the Board is in place.			
Amount of charitable funds needed to successfully resource the organization’s strategic plan have been determined.			
Resource Development Plan in place to accompany organization’s strategic plan and includes multi-year goals and annual objectives to fund: <ul style="list-style-type: none"> - Program access (scholarships) - Program subsidy (to keep programs affordable to most) - Capital needs - Endowment Program and Planned Gift strategies 			
Donor cultivation strategy in place for Major Gift and/or Chair’s Roundtable donors.			
MOVEs Management System and strategies in place to track major gift donor/prospect information by stage they are at in the development cycle: Identification, Cultivation (ready to be asked), Solicitation, and Stewardship			
Strategy in place to secure a portion of charitable gifts and sponsorships, in a multi-year pledge strategy.			

LEVEL THREE PRACTICE BENCHMARKS

(In addition to Foundational, Level I and II Practice Benchmarks)

Table 1. Financial Development Practice Benchmark Checklist

Step 1: Answer each question with a “yes”, “no”, or “in progress”

Step 2: Discuss what action is needed to turn a “no” into a “yes” or an explanation for incomplete implementation of a benchmark.

In place and updated annually as needed	Yes/No	In Progress	Action needed or explanation
Strategy in place for conducting integrated campaigns (annual, capital, endowment).			
At fiscal year-end, there are plans in place to identify and design personal cultivation strategies for at least 50 percent of major gifts donors from at least one fundraising vehicle (e.g. annual, capital, endowment), with the intention of securing a larger gift at the major gift level next year.			
Strategy in place to secure grant funding to start programs with complementary strategy for philanthropic support to sustain the program after grant funding ends.			
Method in place to track which donors give consecutively and how many of these donors increased their gift each year.			

CULTURE OF PHILANTHROPY ASSESSMENT RESOURCE

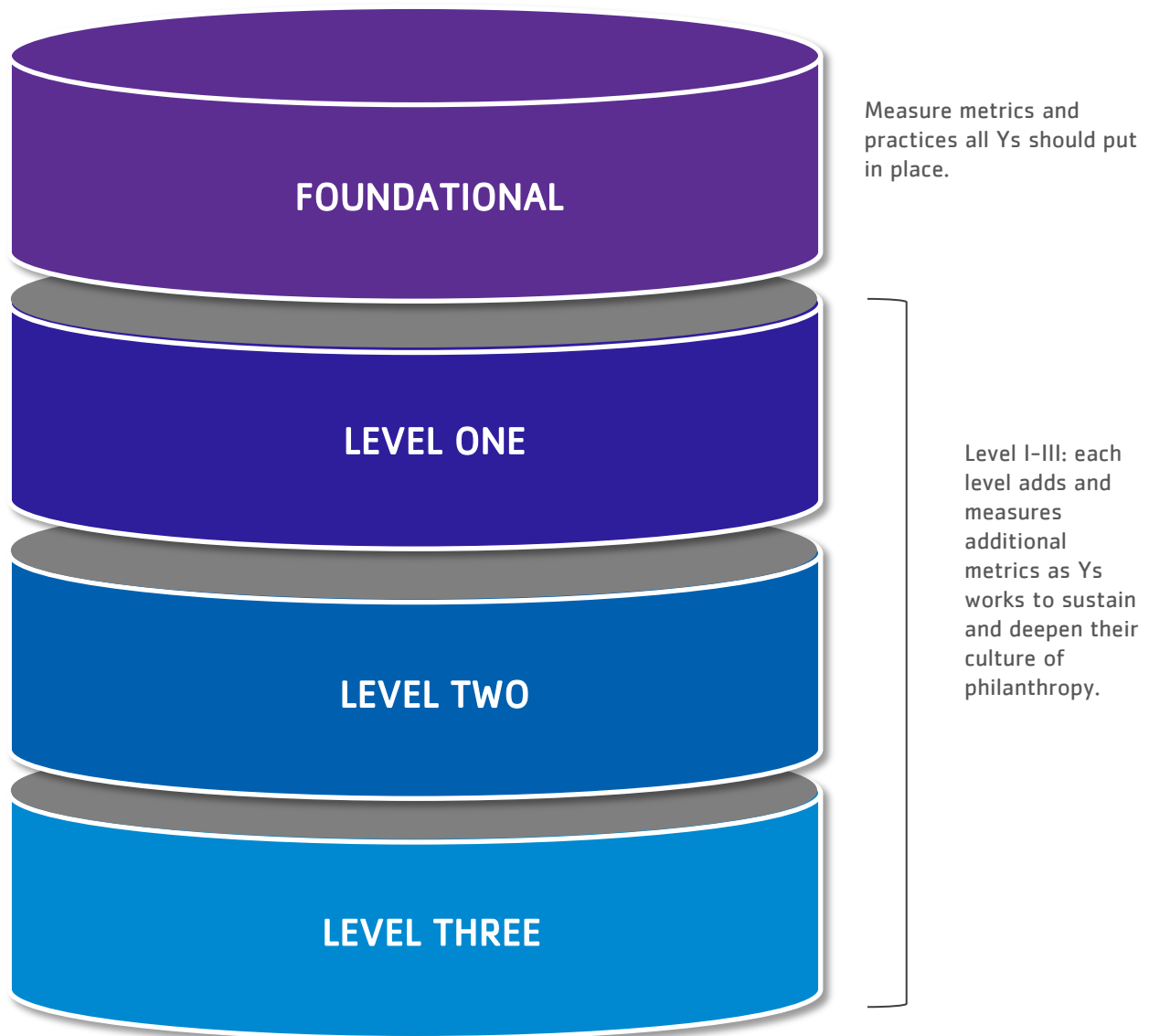
PART II

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METRICS UTILIZED TO BUILD A HEALTHY CULTURE OF PHILANTHROPY

Realizing that all Ys start from different places in this process, the pilot project is designed to test the foundational plus three additional levels of metrics and practices for deepening a culture of philanthropy.

Levels are built on the foundational level that all Ys should measure. Each subsequent level builds upon the foundational metrics included in the previous level.



FOUNDATIONAL METRICS

Table 2. Annual metrics to measure

Step 1: Provide the most complete and current 12-month fiscal year’s results

Step 2: Review results and establish action plan for improvements

**PLEASE NOTE: This column indicates where data is located on Fundraising Fitness Test (FFT) results spreadsheet: TAB NAME (Income Summary=IS; Top Indicators=TI), ROW #, FUNDRAISING PERFORMANCE INDICATOR #)*

Annual Measurement	*FFT Test	RESULTS	
		Annual Campaign	All Philanthropy
Total dollars raised	IS: C12, 37	\$	\$
Number of gifts	IS: C16, 78c	#	#
Number of gifts of \$1,000 or more	IS: G16+H16, 78c	#	#
Average gift amount for gifts \$1,000 to \$4,999	IS:G18, 78e	\$	\$
Average gift amount for gifts \$5,000 and above	IS:H18, 78e	\$	\$
Total number of donors	IS: C15, 41	#	#
Number of donors giving \$1,000 or more	IS: G15+H15, 41		
Number of new donors giving \$100 and above	IS: E24+F24+G24+H24, 5a	#	#
Donor Retention Rates: All Donors			
New donor retention rate	TI: C9, 1	%	%
Repeat donor retention rate	TI: C10, 2	%	%
Percent of donors renewing gifts	TI: C11, 3	%	%

LEVEL ONE METRICS – PART 1

(In addition to Foundational Metrics)

Table 2. Annual metrics to measure

Step 1: Provide the most complete and current 12-month fiscal year’s results

Step 2: Review results and establish action plan for improvements

**PLEASE NOTE: This column indicates where data is located on Fundraising Fitness Test (FFT) results spreadsheet: TAB NAME (TI=Top Indicators), ROW #, FUNDRAISING PERFORMANCE INDICATOR #)*

RESULTS

Annual Measurement	*FFT Test	Annual Campaign	All Philanthropy
Donor Retention Rates by Giving Levels:			
New Donor Retention Rates			
\$0 to \$99	TI: D9, 1	%	%
\$100 to \$249	TI: E9, 1	%	%
\$250 to \$999	TI: F9, 1	%	%
\$1,000 to \$4,999	TI: G9, 1	%	%
\$5,000 & Up	TI: H9, 1	%	%
Repeat Donor Retention Rates			
\$0 to \$99	TI: D10, 2	%	%
\$100 to \$249	TI: E10, 2	%	%
\$250 to \$999	TI: F10, 2	%	%
\$1,000 to \$4,999	TI: G10, 2	%	%
\$5,000 & Up	TI: H10, 2	%	%
Overall Donor Retention Rates			
\$0 to \$99	TI: D11, 3	%	%
\$100 to \$249	TI: E11, 3	%	%
\$250 to \$999	TI: F11, 3	%	%
\$1,000 to \$4,999	TI: G11, 3	%	%
\$5,000 & Up	TI: H11, 3	%	%

LEVEL ONE METRICS – PART 2

(In addition to Foundational Metrics)

Table 2. Annual metrics to measure

Step 1: Provide the most complete and current 12-month fiscal year’s results

Step 2: Review results and establish action plan for improvements

**PLEASE NOTE: This column indicates where data is located on Fundraising Fitness Test (FFT) results spreadsheet: TAB NAME (PP = Pareto Principle), ROW #, FUNDRAISING PERFORMANCE INDICATOR #)*

RESULTS

Annual Measurement	*FFT Test	Annual Campaign	All Philanthropy
Donors & Dollars by Giving Levels:			
Percent of Donors			
\$0 to \$99	<i>PP: D15, 16</i>	%	%
\$100 to \$249	<i>PP: E15, 16</i>	%	%
\$250 to \$999	<i>PP: F15, 16</i>	%	%
\$1,000 to \$4,999	<i>PP: G15, 16</i>	%	%
\$5,000 & Up	<i>PP: H15, 16</i>	%	%
Percent of Gifts			
\$0 to \$99	<i>PP: D21, 18</i>	%	%
\$100 to \$249	<i>PP: E21, 18</i>	%	%
\$250 to \$999	<i>PP: F21, 18</i>	%	%
\$1,000 to \$4,999	<i>PP: G21, 18</i>	%	%
\$5,000 & Up	<i>PP: H21, 18</i>	%	%
Pareto Principle 80/20 rule:			
Percent of Donors to Gifts – High to Low	<i>PP: E26 & G26</i>	% : %	% : %
Percent of Donors to Gifts – Low to High	<i>PP: E30 & G30</i>	% : %	% : %

LEVEL TWO METRICS

(In addition to Foundational and Level I Metrics)

Table 2. Annual metrics to measure

Step 1: Provide the most complete and current 12-month fiscal year’s results

Step 2: Review results and establish action plan for improvements

**PLEASE NOTE: This column indicates where data is located on Fundraising Fitness Test (FFT) results spreadsheet: TAB NAME (Y2D: Year2Distrib), & ROW #*

RESULTS

Annual Measurement	*FFT Test	Annual Campaign	All Philanthropy
Distribution of Donors			
New Donors	Y2D:D12	%	%
Recaptured Donors	Y2D:D13	%	%
Upgraded Donors	Y2D:D14	%	%
Same Donors	Y2D:D15	%	%
Downgraded Donors	Y2D:D16	%	%
Distribution of Gifts			
New Gifts	Y2D:G12	%	%
Recaptured Gifts	Y2D:G13	%	%
Upgraded Gifts	Y2D:G14	%	%
Same Gifts	Y2D:G15	%	%
Downgraded Gifts	Y2D:G16	%	%

LEVEL THREE METRICS

(In addition to Foundational, Level I and II Metrics)

Table 2. Annual metrics to measure

Step 1: Provide the most complete and current 12-month fiscal year’s results

Step 2: Review results and establish action plan for improvements

**PLEASE NOTE: This column indicates where data is located on Fundraising Fitness Test (FFT) results spreadsheet: TAB NAME (GL: GainLoss) & ROW #*

RESULTS

Annual Measurement	*FFT Test	Annual Campaign	All Philanthropy
Gifts Gain/Loss Ratio by Category			
GAINS			
New Gifts	GL:F12	%	%
Recaptured Gifts	GL:F13	%	%
Upgraded Gifts	GL:F14	%	%
Subtotal GAINS Ratio	GL:F15	%	%
SAME	GL:F16	%	%
LOSSES			
Downgraded Gifts	GL:F18	%	%
Lapsed New Gifts	GL:F19	%	%
Lapsed Repeat Gifts	GL:F20	%	%
Subtotal Gifts LOSSES Ratio	GL:F21	%	%
TOTAL - GIFTS	GL:F23	%	%
Donors Gain/Loss Ratio by Category			
GAINS			
New Donors	GL:F26	%	%
Recaptured Donors	GL:F27	%	%
Upgraded Donors	GL:F28	%	%
Subtotal GAINS Ratio	GL:F29	%	%
SAME	GL:F30	%	%
LOSSES			
Downgraded Donors	GL:F32	%	%
Lapsed New Donors	GL:F33	%	%
Lapsed Repeat Donors	GL:F34	%	%
Subtotal Donors LOSSES Ratio	GL:F35	%	%
TOTAL - DONORS	GL:F37	%	%

RESOURCES

ARTICLES

- **Academic article regarding Donor Retention:**
Sargeant, Adrian. Robert F. Hartsook Professor of Fundraising, Indiana University, "Donor Retention: What Do We Know and What Can We Do About It?" (May 2008)
http://www.afpnet.org/files/ContentDocuments/Donor_Retention_What_Do_We_Know.pdf
- **Behavior modification:**
Jacobwith, Jori. "Building The Pipeline" *Ignited Fundraising* (October 13, 2009)
<http://www.ignitedfundraising.com/building-the-pipeline/>
- **Budgeting for Fundraising Metrics:**
Craver, Roger. "A New Fundraising Classic" *The Agitator* (September 6, 2016), book review for: *Data Driven Nonprofits* by Steve MacLaughlin
http://www.theagitator.net/nonprofit-management/a-new-fundraising-classic/?utm_source=feedblitz&utm_medium=FeedBlitzEmail&utm_content=388628&utm_campaign=0
- **Culture of Philanthropy/Donor communications:**
Wagner, Lilya. "No Magic-Just Magical Alignment" www.afpnet.org (Winter 2015)
http://afpfep.org/wp-content/uploads/2014/07/3448_001.pdf
- **Fundraising Fitness Test:**
Daubert, Erik; Levis, Wilson and Williams, Cathlene. "How Fit Is Your Organization?" www.afpnet.org (Winter 2014)
<http://afpfep.org/wp-content/uploads/2015/02/Fundraising-Fitness-Test..pdf>
- **How to keep different types of donors:**
Donovan, James. "Donor Retention" *Donovan Management*. (May 1, 2010)
<http://donovanmanagement.com/wptest/2010/05/01/donor-retention/>

ON EXCHANGE

- **Y-USA Financial Development Page:** Various resources and tools for Nationwide Campaign, fundraising, grants, and stewardship
<https://yexchange.org/FinancialDevelopment/Pages/default.aspx>
- **Annual Campaign:** Manual and planning guide with best practices for how to run an effective annual campaign
<https://yexchange.org/FinancialDevelopment/Pages/Annual-Campaign-Manual.aspx>
- **Annual Campaign Learning Solutions:**
<https://yexchange.org/FinancialDevelopment/Resources/2016-Financial-Development-Trainings-Overview.docx>
- **Essentials Assets: How Board Members Can Provide Critical Pieces to Creating a Philanthropic Culture:**
<https://yexchange.org/FinancialDevelopment/Resources/Essential%20Assets%20-%20Advancing%20Philanthropy%20Winter%202015.pdf>