



Panel 3 Meeting 6 Summary 10.20.2015

Location: 387 Woodlawn Ave, St. Paul

Item 1: Review of previous meeting's notes – Do these notes capture what was discussed?

The panel began the meeting by reviewing and approving the meeting 5 notes. The group agreed that the notes were thorough and accurate to the discussion.

Item 2 – Review of the Expert Interviews

There were eight interviews with philanthropy experts who are recipients of philanthropic gifts or who engage in fundraising and development for a living.

Expert Interview Themes:

- People will stop giving if management changes.
- The world of giving is changing. People don't want to be sold.
- People won't give when they can't see the impact.
- People don't give when the organizational politics don't align with their own.
- People need to trust the organization.
- People give when they have a personal connection or are inspired.

Item 3 – Panel 3 Donor Interview Process – What themes have we heard in our interviews?

The panel conducted 13 interviews with donors from different age groups to learn about what inspired them to give and what organizations they gave to.

Donor Interview Themes:

- **Value.** Donors described contributing to organizations that they feel add value to the community. As donor's values or priorities changes, do does their giving.
- **Relevance.** People want to give something relevant to them. As their lives change, so does what's relevant to them.
- **Trust.** Donors give to organizations they trust. They will stop or decrease giving if there is distrust.
- **Impact.** Being able to see the impact of the work is important.
- **Transparency.** Transparency is a component of building trust and being able to tell the story if impact.
- **Politics matter.** There are divisive issues that might impact engagement or giving. In particular an organization's stance towards Israel.



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Giving Principles:

The recommendations should:

- Benefit broader community not one organization
- Increase the culture of giving in the Jewish community – more people giving, this is a community that gives
- Engage people in the work to develop investment and ownership
- Have a focus on relationship building in order to build trust, leaders, and giving in the community

Recommendation Ideas: (Throughout the process and at this meeting.)

- Use emerging leaders within communities to do the work
- Use stories to get a message across effectively
- Use giving circles to build trust in the process
 - Have a giving circle focused on young people to develop leadership
- Use effective marketing to ensure that stories and work don't get stale

Item 4 – Next Steps – What does the panel need to do to start thinking about recommendations?

The panel will develop themes from the donor and expert interviews and the research and will develop a list of potential criteria to determine which recommendations the panel will choose.

The panel will be sent a meeting wizard and at the next meeting they will start brainstorming recommendation ideas.