

PHILANTHROPY INSTITUTE

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# Navigating Philanthropy With New Donors



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LOS ANGELES

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## Navigating Philanthropy With New Donors

By Dan Rothblatt, Executive Vice President, Jewish Community Foundation of Los Angeles

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*"If you think earning money is hard, try giving it away."*

This statement accurately depicts the challenges facing many philanthropists today. Fortunately, The Foundation serves as a seasoned partner providing customized solutions to help you navigate the often complex world of philanthropy.

Every year, we work with hundreds of donors, grantseekers, and professional advisors to help them navigate the philanthropic landscape and fulfill their desire to make our world a better place. We help new donors chart their philanthropy journey, guide existing donors in determining the best way to achieve their goals, and collaborate with professional advisors in counseling their charitably minded clients.

Through these experiences, we have developed a deep reservoir of knowledge and best practices in the industry, and we serve as a crossroads of philanthropy in the community. We're here to put our knowledge and expertise to work for you, to guide you along a path of strategic philanthropy, enabling you to give with more meaning and confidence and in a way that fulfills your charitable passions.

We work with a variety of donors, some with decades of philanthropy experience and some with none. One donor we worked with, who wished to remain anonymous (we'll call her Debra), had "new donor anxiety."

### **Donor Profile: Debra, overcoming "new donor anxiety"**

Debra opened a Donor Advised Fund (DAF) to help Angelenos who are most in need, but she was unsure how to access the nonprofits addressing this audience. We met with her to gain more insight. We asked what geographic area she wanted to focus on, if she wanted to meet with nonprofit leadership or visit agencies, if she desired to remain anonymous, how much support she wanted to start with, and how involved she wanted to become.

She took time to consider her answers, spoke with friends for input, and then came back with her responses. Debra admitted being a little nervous about this process because, for decades, she was mainly a volunteer at various nonprofits. The thought of now becoming a donor made her anxious, so we helped allay her fears.

Our research uncovered five nonprofits that we thought were a good fit. She liked three of them. However, in case she decided not to fund them, she didn't want the nonprofits we recommended to know her name. Debra was also hesitant about visiting the nonprofits because she was concerned about driving to areas of Los Angeles unfamiliar to her. To help her feel more comfortable, we joined her at each visit, and she was able to directly assess each organization. Later, she met privately with the CEO or program manager of each organization to discuss their needs.

After the meetings, Debra decided to fund all three organizations. The following week, she shared her excitement about starting this journey and how her friends were so happy for her.

Six months later, Debra became quite ill and told us that if she died, she wanted to make sure that the three nonprofits she had fallen in love with would be supported by her DAF after her passing.

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As a solution, we created an agreement whereby the remaining funds in Debra's DAF would be converted into an Endowment Fund at The Foundation to support the three nonprofits in perpetuity in her name. This was extremely meaningful for all parties involved.

Fortunately, Debra recovered from her illness and decided to add a great deal of additional money to her DAF. She was then able to provide substantial perpetual support for these nonprofits that had become so important to her. She shared her plans with her children and grandchildren, and they expressed how much her kindness meant to them.

This is a perfect example where everyone wins. It's what we strive for, what we do continuously, and why we are here. Our mission is to create customized solutions for our donors that are win-win situations for all.