

Dini Partners Asks Philanthropists and
Fundraising Professionals About

Giving in 2011

Rediscovering opportunities for growth



Dini Partners, a national leader in management and fundraising consulting services to the nonprofit sector, has completed its third annual survey of major philanthropists regarding giving in the coming year. This year, Dini Partners gathered additional and new insights by adding a survey of fundraising professionals.

The year 2010 was nothing short of a year of new, falling and restored hopes as we have seen economic indicators rise and stumble only to show continuing signs of stabilization. Indices hit 52-week highs, only to erode gains within a

matter of days and weeks. With movements like those of the tidal surges and swells, the good news was that the threats of collapse were not realized. By the end of 2010, while joblessness remained high along with a depressed housing market, there were clear signs of a slow but continuing recovery. GM stocks were offered to the public and banks made substantive payments on their recovery funds. By midyear 2010, there appeared to be a stabilizing of the philanthropic marketplace as a number of capital campaigns were resurrected or launched for the first time in almost two years.



SURVEY INSIGHTS

In this year's survey, an astounding 72 percent of the professionals responded that their institutions would be in or would launch a capital campaign in 2011.

One of the new participants captured the spirit of the *Giving in 2011* survey results when he responded:

“I believe we are seeing the beginning of a cultural shift in attitude to philanthropic giving, especially among the largest donors, based on the economic crisis of the past two years. This will not abate in the near future, and a return to the same culture of giving that existed prior to the Great Recession is unlikely. This challenges all of us in philanthropy and nonprofit management to adapt, adjust, and be more creative.”

Ed Harris, Vice Chancellor of Advancement,
University of Denver; Denver, Colorado

Beyond economics and the marketplace, 2010 was a year in which politics and the preparations for the midterm elections touched philanthropy. From the sun setting of the estate tax to the passing of health care reform legislation and the question of restoring the Bush tax cuts, 2010 was a year in which the impact of politics on the nonprofit arena was clear. There are clearly questions on the legislative agenda that will impact the nonprofit sector in the year to come.

Knowing that 2010 had been a year of slow economic growth and highly charged political debate, Dini Partners conducted this third annual survey to gauge the philanthropic outlook for 2011. In November 2010, Dini Partners surveyed a select population of major donors—individuals, families, corporations and foundations whose annual gifts consistently average between \$100,000 and \$1 million per year. Among the fundraising professionals who participated in the survey, the majority represent institutions that are raising between \$5 million and \$100 million annually.

PARTICIPANT PERSPECTIVES

The more than 130 respondents to Dini Partners' *Giving in 2011* survey had much to say about the conviction that substantial fundraising and giving must and will go on. Even as Americans deal with the continuing commotion in the economic marketplace and the political arena, respondents have said—even in measured tones—that donors will give and asking must take place in the midst of 2011's new realities.

One seasoned professional fundraiser had this to say:

“The last two years have made many donors look more closely at the impact and effectiveness of their philanthropy. For organizations that are delivering on mission, able to demonstrate fiscal responsibility, and have provided meaningful stewardship to their donors, I believe they will see an increase in their philanthropic efforts in 2011.”

Andy Swallow, Vice President,
Cincinnati Zoo and Botanical Garden; Cincinnati, Ohio

From the donor perspective, participants gave a cautious but firm go-ahead for renewed fundraising efforts. One foundation executive stated:

“This is a good year for non-profits to re-think their strategies for their sustainability and growth in the future—it's a good time to plan for capital campaigns and major fundraising drives for the not-too-distant future....”

Tony Lewis, Executive Director
Donnell-Kay Foundation; Denver, Colorado

At the same time, a note of cautious optimism characterized many of the survey responses. One major donor stated:

“2010 has been a challenging year for nonprofits, and I do not have a sense of clarity for 2011 that would lead me to believe next year will be much improved. I believe the environment for nonprofits will improve, but it will be slow in coming.”

Charles Roff, Vice President,
Roff Resources, LLC; Houston, Texas

THE PARTICIPANTS

Of the 134 total participants in the survey, 68 are philanthropists or representatives of philanthropic foundations or corporations. The individual contributors surveyed have net worths ranging from several million dollars to more than \$100 million. In 2010, 38 of the survey participants have made gifts of \$100,000 to \$999,999, with an additional 23 having made gifts of \$1 million or more. Among the professional fundraisers who participated in the study, 40 represent institutions that raised \$5 million to \$99 million, with an additional seven raising more than \$100 million in the last year. Forty-eight of the professionals have careers in fundraising spanning 15 years to more than 25 years. The three largest industry sectors represented by the professional participants are education with 33 participants, health care with 11 participants, and arts and culture with 10 participating professionals.



“Personal interaction with donors is the key to success. More and more people are immune to direct mail and phone solicitations. Organizations, regardless of size, **MUST** engage, solicit and steward donors on a one-on-one basis. Nothing is more important or more effective.”

Greg Robertson,
Chief Advancement Officer,
Houston Grand Opera; Houston, Texas

THE RESULTS – PHILANTHROPY IN 2011

THE ECONOMY AND GIVING

Last year, 40 percent of the survey respondents anticipated that the economy would continue to improve and eventually stabilize in 2010. This year when asked about their expectations for the coming year, 51 percent of the philanthropists responded that the recovery will be quite sluggish throughout 2011. Adding to this, 35 percent of the donor respondents suggested that we will continue to see positive signs of recovery throughout 2011. Last year's uncertainty does appear to be waning as only 14 percent of the donor respondents remain too uncertain to venture a guess about the economic outlook. This can be contrasted with 28 percent of last year's respondents who anticipated a second downturn before year-end 2010 and the 25 percent who felt too uncertain to venture a guess as to how the economy would fare in 2010. Clearly, while remaining measured, the philanthropists' general outlook has substantially improved over the three years of these surveys.

A bit more bullish are the fundraising professionals. When asked about anticipated fundraising results in 2010, 33 percent predicted raising substantially more dollars than the last year and 61 percent responded that they would raise the same or a few dollars more than they did in 2009. At the same time, 82 percent of the professionals will have larger to substantially larger fundraising goals in 2011. When asked about the larger universe of philanthropy, 91 percent expected to see the same to increased giving in 2011, with only 7 percent anticipating a decline in giving.

In light of this uneven outlook on the economy, philanthropists were asked how the economy would impact their charitable capacity. This year, 69 percent responded that they expected their grant-making capacity to remain about the same as in 2010, with only 24 percent expecting an increased charitable capacity.

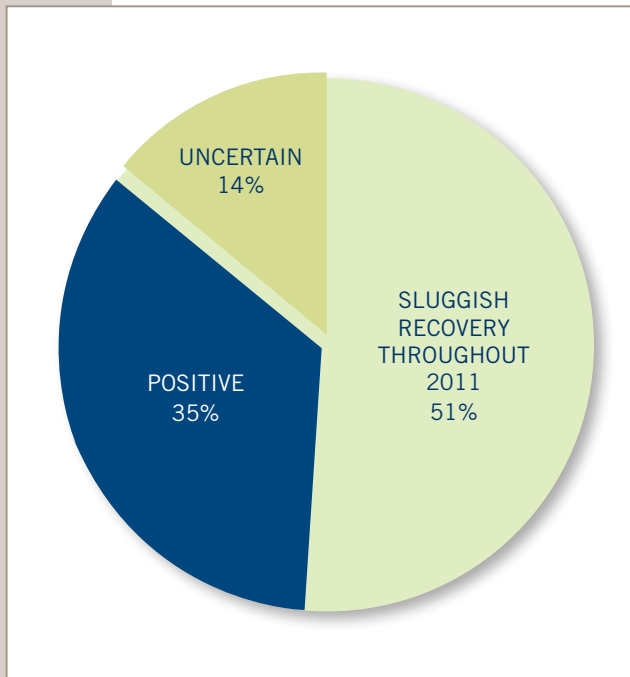


Figure A. Donor Expectations of the 2011 Economy

FACTORS INFLUENCING GIFTS

When asked about which factors will most influence to which institutions and how much they will give, the leading responses reflected an interesting contrast. The single-most important factor in this weighted-response question is the organization's mission. The second leading factor is the organization's record of service delivery, and the third is the organization's past stewardship of donors and gifts. These results suggest that one of the lessons of this period of significant change is to remain focused on the fundamentals.

Among fundraising professionals, the three factors that will have the greatest importance in the planning of their development efforts for 2011 are the organization's mission, the strength or skills of board leadership, and the strength or skills of the development staff.

For new programs and initiatives, 50 percent of the donors told Dini Partners that a personal relationship to the organization or cause is of paramount importance. The second and only other factor receiving a significant response relative to new causes is the rationale or merits

of the case. While donors continue to focus on those causes where there is historic support, there is some openness to new projects. It is clear that developing a personal relationship will be the key for new giving relationships.

While highlighting the importance of relationships, it might be helpful to note who fundraising professionals suggested would be the most important person in solicitation calls. Crystallizing an important trend toward professional engagement in solicitation, 44 percent suggested that the institutional CEO was the most important person in the solicitation call, followed by development professionals at 24 percent. The chairperson of the board was considered to be “most important” on solicitation calls by only 10 percent of the respondents, leaving the mix of board members, campaign workers and other volunteers at 22 percent.

When asked about return on investment (ROI), 66 percent of donors responded that ROI is meaningful to essential, while only 29 percent represented that it was interesting but not essential. Clearly the message is mixed. While ROI is important, what we learned—again—is the importance of mission, service delivery, stewardship and relationships.



“Never stop telling your story. When the economy is bad, the need for services only goes up. It is a great time to make new friends.”

Jan Weimer, Vice President of Development,
YMCA of Metropolitan Denver; Denver, Colorado

AREAS OF SUPPORT AND ALLOCATION OF GIFTS

Each year, philanthropic individuals, families, foundations and corporations are asked to support a variety of programs—from annual funds to capital campaigns and endowment drives. When asked about what programs they are more likely to support in 2011, 71 percent responded in favor of annual appeals or funds in support of operations—an interesting drop of 5 percent from the previous year. In contrast, with a 13 percent increase over the previous year, 48 percent of respondents suggested that they would consider funding for capital and new programs. Additionally, 26 percent would support endowment fund campaigns in 2011—an increase of 8 percent over the 2010 results.

At a time when more nonprofits and public institutions are aligning to create public-private partnerships, donors were asked about how they react to the concept of fundraising for such joint entities. Thirty-three percent responded that they would support public-private partnership fundraising efforts, and 51 percent responded with a high degree of openness and flexibility. Only 15 percent of the respondents found public-private partnerships problematic and therefore not viable candidates for their philanthropic support.

In the 2009 and 2010 surveys, many donors—including individuals, foundations and corporations—limited their gifts and grants to single-year commitments. For 2011, an encouraging 71 percent of the respondents suggested that they will consider multiyear pledges or grants, with only 29 percent limiting their giving to single-year commitments.

Donor participants were asked what would best summarize their advice to organization leaders and development professionals for 2011. In the 2010 survey report, the overwhelming response at 56

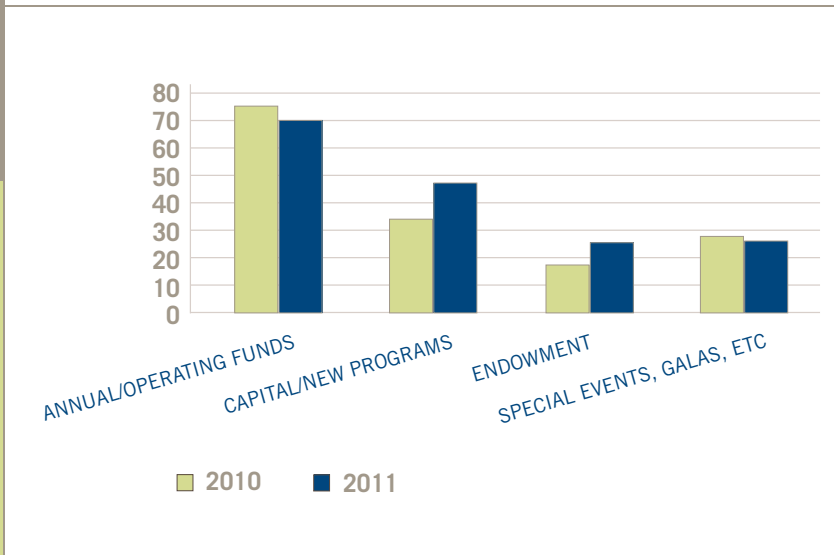


Figure B. Giving by Program Type

“Keep on with concentrated definitive plans to stay close and cultivate your supporting friends in additional and new ways.”

Tom Frost, Chairman Emeritus, Frost Bank; San Antonio, Texas

THE RESULTS – THE IMPACT OF PUBLIC POLICY ON PHILANTHROPY IN 2011

Survey participants were asked about a variety of public policy questions that were thought to have some potential impact on giving in the coming year. Throughout the year, pundits and economists have suggested that many investors, business owners and consumers are holding off on reinvestment, new hires and purchases until it is clear how tax law and health care changes will impact their personal and/or corporate bottom line. We wondered if giving would be held, adjusted or constrained based on some of these legislative decisions. The survey asked how these issues would impact donors’ decisions about giving in the coming year.

AFFORDABLE CARE ACT

When asked how the Affordable Care Act (health care reform legislation) might impact a donor’s inclination to give, 53 percent said that the passage of this legislation would have no impact on their giving. An additional 25 percent said that they would maintain or increase their current levels of giving for health care institutions, medical education and medical research. Only 4 percent of donors suggested that their giving would decrease to health care institutions, medical education and medical research.

ESTATE TAXES

The response to the questions concerning the reinstatement of estate taxes had surprising results. A significant 67 percent of donors suggested that there would be no impact on their overall 2011 giving. Nine percent suggested that the reinstatement would decrease their interest in giving from their estate, while 12 percent suggested that such a reinstatement of estate taxes would increase their

percent was to stay the course and do their best to keep annual giving strong. The 2011 survey reflects a more optimistic tone, with 16 percent of respondents indicating that this is the year to launch new capital endeavors. Another 11 percent suggested this is the year to refocus on planned gifts and select major gifts. Only 32 percent suggested maintaining a focus on annual giving and stewardship while holding off the major projects. At the same time, 32 percent suggested the need for one more year of recovery, allowing for time to work on strategic planning.

One respondent’s advice appeared to summarize the general tenor of donor responses:

inclination to give from their estate. When fundraising professionals responded to this question, 49 percent suggested that reinstated estate taxes would encourage giving from estates.

CHARITABLE DEDUCTION

When asked about the oft-raised question of the loss or reduction of the charitable deduction, the message from donors was very mixed: 51 percent said that such a reduction would decrease their philanthropic investment and giving. At the same time, 42 percent of donors said that such a loss or reduction would have no impact on their philanthropy in 2011. Only 3 percent suggested it might cause an increase in their giving. When fundraising professionals responded to this question, 71 percent anticipate that the loss or reduction of the charitable deduction would decrease philanthropic giving.

PARTICIPANT INSIGHTS

Throughout the survey, participants were given the opportunity to share additional insights or to offer advice to those working in the field of philanthropy and nonprofit management.

“Look at your giving as a percentage of your asset base versus simply your income.”

David Weekley, Philanthropist; Houston, Texas

“Money will continue to be tight, but those that want to give, will give. You need to make a case on what good you would do now with my money that someone else can't or won't be able to do. If you can't convince me of that case, my money will go to someone else.”

John Denson, Philanthropist; Houston, Texas

“Every industry has peaks and valleys, relationships are the most important things to maintain through these. During these times, only compelling needs will be funded.”

Jay McAuley, President,
Texas Health Presbyterian Foundation; Dallas, Texas

“During this time of economic uncertainty, I'd recommend that organizations stay focused on their mission and the stewardship of their organization—maintain the integrity of their programming, sustain the organization and strategically plan for the future.”

Linda May, Executive Director,
The Simmons Foundation; Houston, Texas

“It's really about the basics—ensuring good communications touch points with your best donors to understand your work, the needs of your organization and your clients ... asking for their support and getting their help to enlist others.”

Anne Neeson, Vice President, Donor Relations,
United Way of Greater Houston; Houston, Texas



“While there is still a great deal of uncertainty on US fiscal and tax policy right now, the overall US economic picture in general, and the stock markets in general, are improving (albeit slowly). This is absolutely the time to start bringing stakeholders into the process of thinking big and impactfully about the institution's future. This will set up greater success in the outbound years.”

Darrow Zeidenstein,
Vice President—Resource Development,
Rice University; Houston, Texas

“Institutions whose missions are clear and persuasive that have an effectively managed development operation will do well in the year ahead.”

Patrick Mulvey,
Vice President for Development, UT MD Anderson
Cancer Center; Houston, Texas

“The lessons learned in the last two years are the importance of planned giving programs; good and consistent stewardship programs; working with outstanding consultants; maintaining momentum and enthusiasm in difficult times; continual communication with benefactors, volunteers, the institution’s constituencies; collaborative efforts with various constituencies; and revising strategies as needed.”

Sr. Shirley Miller, Director of Mission Advancement
Society of the Sacred Heart; St. Louis, Missouri

“If you have the luxury of preparation and cultivation for major gifts during 2011, do it. Prepare for the campaign and make absolutely sure you have support and buy in from those closest to your institution, then move forward in a year. If those projects cannot wait—trudge on—but make sure you are on sound footing.”

Christie Corbett, Vice President for Institutional
Advancement, Texas Biomedical Research Institute;
San Antonio, Texas

DINI PARTNERS’ OBSERVATIONS AND RECOMMENDATIONS

The following observations have been gleaned from the *Giving in 2011* survey results based on the contributions to this survey by participating philanthropists and fundraising professionals.

The last two years have been a period of significant retrenchment, reassessment, realignment and now rediscovery for donors and for those working in the fields and vineyards of philanthropy. Change has been a constant as both donors and staff have had to wrestle with questions of diminished resources, and in many cases, unchanging expectations for growth and fundraising success. The storms of the last two years have finally given way to calmer, though still unsettled, weather. The philanthropic climate as evidenced in this year’s *Giving in 2011* survey suggests slowly clearing skies and new opportunities for asking and giving.

2011 will be a year for renewed asking. In the 2010 survey, participants expressed a definite hesitancy to consider new projects and campaigns or even new institutional relationships. For 2011, this sentiment has changed. Participants stated that they would give to campaigns where they have a pre-existing relationship. Some have suggested that they are open to establishing new institutional relationships which would lead to new giving. Not only are donors willing to consider giving, but many have suggested that they are open to consider gifts to capital campaigns and gifts that will involve multiyear commitments. These very positive outlooks suggest that 2011 will be a year for institutions to be back in the business of asking.

In 2011 relationships will be supreme. A constant in the results of each of the surveys of the last three years is a focus on relationship—the importance of the stewardship of relationships with donors. As a climate that is more supportive of giving settles in, institutions and development officers can anticipate a more competitive environment for donor interests. In the last two years, many donors have pulled back to focus on



family and business concerns. In the coming year, as donors return to higher levels of engagement, those who take the time to care for, listen to, educate, cultivate and steward their donors will be the ones most likely to be on the receiving end of their attention when it is time to make gift decisions.

In 2011, look to the CEOs on the major asks. A very important shift that has occurred, or at least been confirmed in this historic period in philanthropy, is the further professionalization of the asking process and the consequent expectation of major donors that the institutional chief will be a part of the major solicitations. Additionally, there is the expectation that more and more solicitations will include a development professional—a clear shift from the volunteer solicitor model that has held sway in much of the fundraising world for decades. This observation must be delicately balanced with the contributions made by so many volunteers and board members who consistently leverage their relationships and peerage to encourage the highest level of gift support from their friends and professional colleagues.

For 2011, “back to the basics” will be a theme for philanthropy. Again, one clear message in this year’s results is a call for development programs to get back to the basics: sound strategic planning, establishing clear rationales and objectives for fundraising, communicating the mission, attending to institutional transparency and efficiency, excellence in service delivery, continuing cultivation of donor relationships and professionalism in asking, and thoughtful gift stewardship. Donors are telling us that for the gift-decision process, the rationale for the ask and the significance of the mission far outstrip the boldness of the ask in importance.

2011 will be a year of renewed capital, endowment and major gift campaigns. The survey results on the part of the philanthropists and the professionals clearly affirm that the words “capital campaign” will be heard with greater frequency and enthusiasm as we move into 2011. Ideas and projects that have been shelved waiting for a better fundraising climate are being reintroduced across the country. New initiatives are far more likely to be welcomed by donors with pre-existing relationships as long as the projects remain close to the institutional mission and strategic plan.

2011 will be a year with a significant policy agenda relative to philanthropy, nonprofit institutions and donors. While the U.S. government continues to struggle with the issues of revenue generation and the national debt, we can expect a variety of public policy conversations that are expected to impact philanthropy. At a time when development professionals are concerned about the potential reduction of tax incentives for charitable giving and planned giving, donors have said that the commitment to philanthropy runs deeper than tax savings alone. Any moves to reduce tax incentives for giving or increase taxes can be expected to have an adverse impact on the giving of some; however, the majority clearly stated that their giving will continue at current, if not increased, levels.

2011 will be a year to stay the course relative to management and a year to get on with it relative to fundraising. In summary, the conscious concerns about efficiency and the fundamentals of the fundraising process are coupled with a desire to continue to develop our institutions through increased asking and giving. While it was difficult to imagine many major asks as institutions made their way through the dark period of 2009, it is clearly the message for 2011—return to the business of confident and professional asking for those things and programs that matter at our institutions.

BASED UPON THESE OBSERVATIONS, DINI PARTNERS OFFERS THE FOLLOWING RECOMMENDATIONS FOR 2011:

- 1. Fine tune your existing programs for annual, major gift and planned gift support.** Rather than looking for what is new and creative, make sure that the fundamentals of personal relationship stewardship are in place. The care for donors that was promoted in the first survey outcome holds true today. Having avoided the worst that was feared, assure donors that you are at your best in your ability to listen and respond to their desires as donors and partners in your mission. Consider conducting a development assessment or review to determine the strengths and the gaps in your development program—from staffing to systems to techniques for prospect and donor management.
- 2. Spend time with donors.** In so many institutional settings, the approach to donor care is accomplished in group settings—recognition club events, presidential receptions and insider newsletters. Take the time in 2011 to spend face-to-face time cultivating old and new donor relationships. Relationships, interests and attitudes change over time, so do not assume that yesterday's good relationship will be tomorrow's unless you are spending valued face-to-face personal time with your donors—whether they are spouses, individuals, foundation trustees or corporate officers.
- 3. Listen well, share the mission and impact, and ask with confidence.** One back-to-basics recommendation is that of first listening to why donors are engaged with your institution and what motivates their giving choices. With those insights shared, be sure to remind your donors of your mission focus and adherence to the core purpose for your organization. Communicate well face-to-face, with presentation materials and in writing, using success stories to demonstrate how your mission translates into impact—how lives are changed. After listening, sharing the mission and communicating the impact, ask with confidence for the gift you hope to realize. In these years, it has become a truism that confident asking results in confident giving—that is, a well-grounded request will yield a well-considered gift.
- 4. Prepare the best advancement presentation.** As part of the process of renewing the advancement program, review and rewrite your elevator speeches regarding the institutional mission and vision for the future in light of the current circumstances and the current strategic plan. Make sure that every senior administrator, development officer, board member and development committee member can readily articulate the mission, vision, community impact and role of philanthropy for your institution. Every leader should have the case for support prepared and ready as a two-minute presentation.
- 5. Professionalize the asking process.** In these days in which densely cultivated leadership and peerage networks are giving way to multilayered, multicultural and often-changing leadership structures, rely on the stable, confident and seasoned voices of institutional chief executives and development officers. Development staffs can no longer assume that there are cohorts of seasoned and deeply experienced volunteer fundraisers waiting for assignments for solicitation. Increasingly, institutions must rely on the CEO and the development staff to augment the “asking team.” While volunteers continue to bring words of passion and commitment, it is often the staff person or professional leader who is most at ease and confident in making the explicit request for a gift.

6. Think and act for efficiency and effectiveness.

As institutions emerge from the worst of the economic downturn, having cut advancement staffing and fundraising program expenses, be careful to rebuild with a view to heightened efficiency. Find new ways to address areas that seemed to have been inefficient and overly expensive in previous years. Be cautious not to simply rebuild the old staffing model. Focus on what will be most effective in the areas of donor and gift stewardship, cultivation and asking.

7. Use a campaign to leverage a renewal of your philanthropy program.

Campaigns have a transformational impact—they change the way donors and constituents think of nonprofit institutions. Consider using a campaign or specific major gift initiative as a way to move your institution back into the arena of active donor cultivation and solicitation. Utilize the campaign planning process as a means of cultivating donor interest by listening to their current interests and motivations for giving, and shaping strategies for the best and most important asks for the future of your institution.

8. Limit the use of special events as primary fundraising vehicles.

Instead, utilize events for donor cultivation and care. In the survey, only 27 percent of the donors suggested that they would fund special events in 2011. Given this statistic, it is imperative that institutions with special events use these occasions as practical opportunities to cultivate and educate those they will ask to be annual and major donors in the course of the year.

9. Mine the lists. One of the realities of the past three years is that many known and reliable donors have moved off center stage while other emerging and capable donor prospects remain virtually unknown—buried in the mountain of names that comprise institutional databases. Use 2011 as a time to revisit your lists, identify and screen potential major gift prospects, and create the agenda for donor cultivation throughout the year. Then, following recommendation #2, spend face-to-face time with these new potential major gift prospects and suspects.

10. Address public policy questions with your donors. Within the limits of the law, be prepared to speak to the legislative issues concerning philanthropy, tax incentives, nonprofits, and the role of the independent sector in the U.S. As the economy continues to be a major issue and concern for donors and institutional leaders, it is important to be current on the questions they will have about how proposed legislation and regulations will impact the advancement program of nonprofit institutions. Ask donors about their opinions and know what donors are thinking before formulating your thoughts about what is best for your institution. Do recall that most donors have suggested that the measures that have been under consideration in recent months will have little to no impact on major gift philanthropy.



“Raise your expectations. Americans will always be philanthropic and as long as you have the right cause, right prospect, right solicitor and right amount, you will be successful.”

Dean Gladden, Managing Director,
Alley Theatre; Houston, Texas

It has been our pleasure at Dini Partners to offer this survey and coordinate the input from so many wonderful major donors and leading development professionals from around the country. We are encouraged as we hear both groups address 2011 as a year of opportunity, best practice fundraising, renewed asking and major gift programming. The continuing nervousness about the global economy and local unemployment reminds us that all is not over and that many of our sisters and brothers continue to suffer economic hardships. At the same time, donors are signaling that it is time to ensure that the institutions they cherish seize the opportunities to strengthen, shore up and advance their missions. As a service to institutions and the philanthropic community, it is our desire that all share this *Giving in 2011* survey report widely.

One respondent summarized the heart of this survey report when responding:

“I believe it is important to keep asking for financial support in 2011 and to follow the same guidelines that one uses during any kind of economic environment: ask the right person for the right gift for the right cause at the right time.”

Peggy Roe, Senior Vice President for Advancement,
DePelchin Children’s Center; Houston, Texas



For more information, or to inquire about speaking engagements that present this data in a more in-depth format, contact:

Larry A. Vaclavik
Principal and Managing Partner
Dini Partners
2727 Allen Parkway, Suite 1650
Houston, Texas 77019
713-942-8110
(toll free) 800-836-0411
www.dinipartners.com

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