

Loving The Art of **FUNDRAISING**

LEADERSHIP TALKS





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You Can't Look Everything Up

He was a wonderful professor. Great teacher. Kept the entire class engaged. And, he changed my life.

As a college freshman, I was out of my depth. Away from home for the first time. Didn't know anybody. Felt like I wasn't nearly smart enough to be there but since I was the first one in my family to go to college I felt a lot of pressure to do well. I frantically read the material—over and over. I thought I had to cram it all into my brain. Then, one day, this professor said to me, “You don't have to know everything. You just have to know where to look it up.”

Literally changed my life.

Since that time, though, in a fundraising career of twenty-five years, I've discovered that some things just are not in books. You can't look them up. Some things are only found in experience. I thought it would be fun to share what I consider to be a few of those things. I asked some friends to share some experiences as well.



My mission here is to share some insights and experiences not found in books. To celebrate the art of fundraising, I definitely honor the science of fundraising and am grateful for all the people who have added to the field in such significant ways. Ah, but early in my career, I fell in love with the art of it. The magic of people. The unexpected experiences—good and bad. And that feeling has kept me enthralled to this day.

So, here are some “truisms” that are topics of conversation among fundraisers of all experience levels. Questions that come up consistently but aren't really in the literature. I'm grateful to have met some of the kindest, most generous people in the world who have been part of my artful journey (shout out to William Sturtevant!).



You Are Cordially Invited

Invitation. Such a great word. It elicits thoughts of fun, of camaraderie, of great music and good friends. For Bill Littlejohn, the CEO of Sharp Healthcare Foundation, it means being a facilitator. Inviting people on a joyous journey.

He likens his role as elevating people. Fundraisers, colleagues, staff and donors. For Bill, the art of fundraising is all about helping great things happen. He's been doing just that for 34 years. Within those experiences, one stands out. He was consulting for a hospital that wanted to run a campaign to build a new facility. It was a small hospital without a fundraising team and a not so great reputation. It had just joined a larger system, so the culture was definitely in the chaos stage of change.

The community deserved a new hospital, but the resources—fundraising staff, donors, community support and belief—weren't in place. Bill saw past all that to the potential of the people in the hospital and in the community. There were strong relationships in place. And relationships build community. They build things that might seem impossible. Because when even just two people come together for the same cause magic happens.

The most money ever raised in this particular community was \$250,000 for a senior center. The metrics might say, ok then, that's that. But, not really. The metrics didn't account for the strength of bringing powerful guidance and success pathways together with people who

want to make a difference. Still, telling them they could raise \$1,000,000 seemed a tad crazy. Impossible. Can you see the faces? The disbelief?

Bill had experienced the force of relationships when married to a great cause. He knew the power of that. The community needed the hospital and the hospital needed the community to support its seemingly ridiculous intention to create something better—for them.

The campaign didn't raise the \$1,000,000. The people involved actually ended up raising \$1,400,000. Bill went to the celebration party and got a ton of thanks from everyone there. He told them he appreciated the sentiment but that he didn't actually do anything. They did it. Bill just provided some guidance—they shared the importance of the hospital with patients and the community. They made having a state-of-the-art hospital real.

For Bill, there is no greater reward than helping organizations achieve what they thought wasn't possible. He helped this small, vitally important community asset find pride in their community and in themselves. Pride that brought the power to change the status quo.

That's what fundraisers do. We don't actually raise money. We show others how to bring life to a dream. As Bill so eloquently puts it, "There's no greater reward than helping others achieve something great. Being a fundraiser represents being in a profession that's all about engaging people in making things better than they were before."

That some beautiful art. Inviting people to dream. To create change. To make the world a better place. That's the greatest invitation a fundraiser can send.



Why Don't Physicians Give?

“Why don't physicians give?” How many times have you heard that? You can replace the word “physicians” to almost any group—teachers, board members, etc. Here's the thing. Lumping an entire group of people, categorized by profession, into a box and saying/thinking they are all the same or have some group obligation is offensive. Why aren't we asking how come engineers don't give? How come the people who live on Main Avenue don't give?

Would you put all of your donors into a box and say, “You all have to give because you're fire fighters!” Or “You all have to give, my goodness, you're teachers!” So, I think the first thing we have to do is forget about them being physicians, because it doesn't matter.

Whether they're a physician, a rock star, teacher, or an engineer. Now look at them as people and say, “Okay here's a person who has an interest in what we're doing. How can I bring that out?” You see, there's no secret to it. It's treating everyone like a donor, a person. For example, I had a physician, an emergency medical physician who was Chief of Staff, and I asked him “What can I do for you? What are you interested in?” He said, “You know, I really want to get a new helicopter.” He went on to list all the reasons it was vital to the community to have a helicopter capable of going “where no man had gone before.” He also said it would be impossible. I said “Well, why do you think we couldn't get it?” He said, “Well, we don't have the money.” I said, “You know what, there's always enough money for a good project, so let's work on this together!”



We did, and he created a stampede of physician giving. Because why? Because he was passionate, he was interested, and he wanted to make this happen, just like any other donor. Just like an engineer who comes in and says, “You know what, I want to help fund the next generation of engineers.” Physicians are the same way! So, my tip to you is: forget they're physicians.



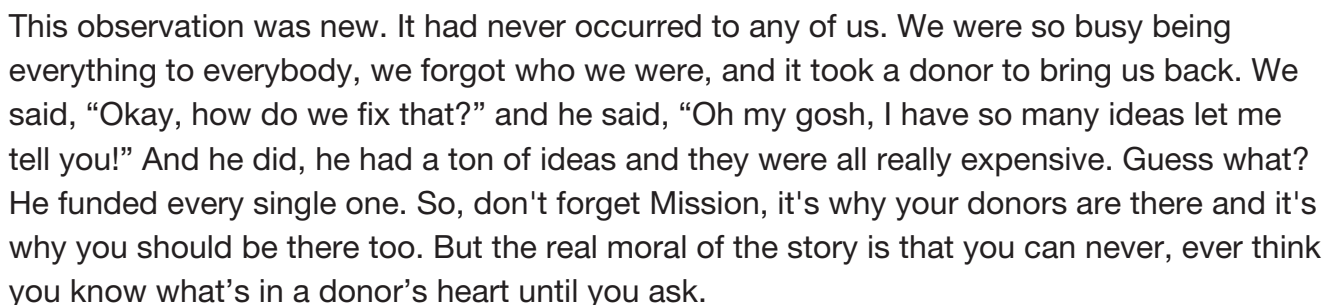
People are messy. People are amazingly complex and unique. Don't put a \$ sign in front of their faces...look at their faces. Listen to their dreams. Understand their values. Only then can you truly call yourself a donor-centered fundraiser.



Nothing is more important than your mission, and sometimes in the running around, and the day-to-day we forget that. We forget about the reason we're here! It's the reason you're doing what you're doing, it's the reason people are involved, it's the reason people give. I learned this lesson the hard way—very embarrassing because, of course, I felt in tune with the mission.

We sat down with him, knowing we're going to get a fabulous gift. The conversation starts out great and we work through the information again even though he's a sure thing and certainly knows a lot more about the project than the typical donor. We ask. It's silent. We wait for him to respond with an "of course." Then, he says,

Oh, really? OK! Well, I had nothing to say. I was speechless. I did not expect that, I didn't know what was going on. Here we just saw this as a slam-dunk. We totally expected he would make a generous gift. Then, he says, "I'm not happy with the project." So, I said, "Okay, would you please tell us why?" What would you like to see different?" Guess what? No mission! He said, "We are a religiously-based organization and we do not have one single symbol of our faith or our values represented in this entire new building."



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Connecting With Purpose

Nigel Allen is the driving force behind philanthropy at the Tallahassee Memorial Healthcare Foundation. He started out as a journalist—working with Gannett and then Fortune magazine. He says it was great introduction to philanthropy which is also all about bringing something important to life.

He believes in making donors the heroes of his Foundation and the organization it supports. He calls it “finding the donor knot.” What’s meaningful for them. So, at every board meeting, Nigel has a “connect with purpose” moment. He invites organizational care leaders to come and talk about their area of medicine. How it works. Why it’s important.



At one meeting, a physician talked with the board about a telemedicine project for the Neonatal Intensive Care Unit. He shared how it would provide care and bring these tiny patients and their families the world of resources. He wanted funding for three machines. Are you surprised that a board member gave the needed funds right then and there?

Another meeting. Another physician. Their department needed space. All it would require was knocking down a wall. But the organization had more pressing priorities and couldn’t manage the cost right then. One of the board members owned a construction company. Not hard to guess what happened. The wall was gone and the donor was very happy he was able to improve the quality of care by improving the quality of space!

Another donor was a patient who connected with the nurses. He learned about the shortage of nurses and the strain that placed on the amazing professionals who made sure he was well taken care of. Compassionate care by caring people. This donor went on to create a large number of endowments for nursing scholarships. He wanted to help those who helped him—in a big way that would have impact not just for this particular hospital but across the country.

Highlight your work. Illustrate the miracles that go on in your organization every single day. Connect your donors to the people they are supporting—caregivers and patients. The only limit is your own imagination and creativity in creating the environment where these deep connections can happen naturally and with great respect. Connect with purpose.



Martin Luther King Did Not Yell “I have a strategic plan!”

I love plans. I love knowing what to do, how to do it and when it should happen. Yet, that doesn't always necessarily mean anything. I credit Simon Sinek with giving a deeper meaning to the word “Why.” It's so much more important to understand why something should happen. All those strategic plans I've been part of over the years didn't answer this question. Then, they ended up on a shelf and we sighed and thought, “Yeah, that's done. What's next?”

Most are useless. Because they are hundreds of pages long, they're in really pretty notebooks with these very expensive covers, and you spend a whole day or even two in a retreat, and you go through it and everybody



presents, you're all gung-ho when you go back to your office, and you put it on your shelf, go on to the next thing, and it's done. So, forget about strategic plans and all those beautiful metrics that measure whether you are successful.

My point is not that you shouldn't have a plan. My point is to start the journey from Why? Why do you need a plan? What end are you trying to get to? What glorious dream is waiting at the end of the strategic plan journey? Where are you going and WHY are you going there.

Take the time to really answer those questions. Un-complicate the process. Pick three things that you are going to accomplish in a reasonable time frame then build a plan around those and only those. Steve Jobs was a master at focusing on the three things that mattered most to achieving a vision. You can do the same. And you'll actually get somewhere really incredible.



Martin Luther King Did Not Yell “I have a strategic plan!”

For example, you want to have a capital campaign, you’ve got a timeline, and you have goals. If you look at that and you follow it, guess what? You will achieve the goal, sure. But what will you really have achieved? Better educational programs? Better access to care? Lives changed? That’s where to start. Once you decide the destination then, and only then, should you start mapping out the strategies, goals, tactics and measures.



Another great advantage to this approach is when that board member or CEO comes to you and says, “I have this fabulous idea! Let's do this,” You can say, “Oh that's great! Let's talk about that more after we get through with these three projects that we all agreed were our priorities.” Works like a charm.

I'll give you an example. I had a CEO, a real live wire who was a lot of fun. He was really intelligent, an idea every 60 seconds that was huge, and he came to me and said, “Guess what we're going to do? We're going to do a debutante ball!” I'm thinking “Okay, I’m not sure where the debutantes are going to come from and this type of event wouldn’t really work in our culture so, not a great idea, right? So, I said, “You know what? Let's keep that in mind next year when we're planning. Because here’s what we're doing this year, if you remember,” and I pulled out that plan, I showed it to him, and we were back on track. Trust me, it works with CEOs; it works with CFOs, and really, really works with board members.

So, do have a plan, just make sure it’s one that’s real.

After one has discovered what he is called for, he should set out to do it.... Martin Luther King, Jr.



Donor First

How do you measure that? Metrics are fabulous for planning. They help create accountability and put parameters around things that are difficult to measure—things like relationships. But over the last decade or so it seems that metrics are taking precedence over relationships with donors. Goals are often arbitrarily disbursed. Questions about quotas and timelines for gifts are common discussions in foundations all over the country. But when this happens, it can create cultures built on transactions and competition.

And, most important of all, donors don't care. They don't care if you have a goal to meet. They certainly don't enjoy having dollar signs in front of their faces. Just imagine a room full of donors. Now imagine putting a dollar sign in place of their face. Not a great picture.



Debra Griffith understands the damage this type of thinking is doing to our field. Several years ago she was working with a couple, both of whom were well known to the organization and who had been very philanthropic throughout it.

Sadly, tragedy struck their family. One of their children, who was attending college out of state, needed to return home urgently due to serious health concerns. Not knowing where to turn for help, and knowing the situation was worsening, Mrs. Donor called Debra for help. Debra was able to expedite arranging an appointment for them with a specialist who worked with patients suffering severe emotional trauma. Their child was admitted to the hospital where care and treatment were received.

Shortly thereafter, Mr. Donor—a nationally known businessman philanthropist—called and asked Debra to meet him and his wife for lunch. As you might imagine, this generated a significant amount of interest throughout the organization as this donor couple had been identified as being priority prospects for an upcoming capital campaign.



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Debra was naturally nervous. She knew there were a lot of colleagues who had engaged with this couple and yet here she was catapulted to the front of the line. Certainly not ideal in an environment where strict prospect management protocol was heavily instilled. Our systems and metrics would have definitely put someone else at that lunch table.

At lunch, Mr. Donor pulled out his checkbook and pointedly asked “What does this doctor need? We’re grateful. We want to help.”

Debra declined the gift. Let that settle in.

She gently responded to the couple saying she didn’t think it was the right time to have a gift conversation. She suggested they should take the time to focus on their child and getting him/her well. “I just want us to focus on making sure everything is taken care of so you can all enjoy the trip you’ve planned.” Debra knew they were in an emotional tornado and didn’t want to take advantage of that.

Her boss was stunned and probably a little angry. Metrics. But Debra believed they were not in a state of mind to make a gift decision and she protected them by putting their needs first. Not at all an easy decision to make or defend.

Debra continued to meet with the couple after that and they had many long discussions about the couple’s interest in doing something to address the gaps they found in healthcare through their experience. As such, Debra connected them with a physician who had a huge vision and was eager to share it.

As he shared that vision and his hopes for what could be accomplished. Mr. Donor asked, “What do you need to get going?” The physician replied, “We need to further develop the concept and then get some funding to make it a reality.” Mr. Donor then asked, “Will \$1 million right now get it going?” Yes. A tremendous opportunity to fill a gap in care was born. Would his earlier offer of a gift been at this level or have this much impact? Likely not.

Yep.

“STAYING TRUE TO YOUR DONORS
is the commitment you make
WHEN YOU AGREE TO BE A FUNDRAISER.”

Debra Griffith



The Reality of Donor First

Michael Schultz is a talented and experienced fundraiser—Legacy Health is lucky to have him leading the philanthropic charge!

His favorite story about the art of fundraising came from a very special donor. This man was the first patient in the cardiac program. The physicians and nurses there saved his life. He was bone-deep grateful.



So, of course, the opportunity to express that gratitude through a gift would seem like a no-brainer. But the most important thing for this donor was his ability to negotiate. He'd built up a very successful business and, yes, he wanted to help the cardiac program. But, he wanted to do it his way. He was all about business and he wanted to understand the business side of healthcare.

So, Michael introduced him to the Chief Executive Officer who spent time with the donor. She spent a lot of time explaining healthcare and how it works—the financials, the rules, the regulations, etc.

The donor was actually more of an investor than a philanthropist, so he kept learning and asking questions. He started out with a \$50,000 gift and over the course of several months and then years, he kept increasing his giving. But, above and beyond, the reason he kept giving is become the fundraisers and the leadership met him where he needed to be—in operations rather than philanthropy.

They understood and respected his keen interest in business and when the next gift opportunity came up, he said “You’ve worked with me as I’ve pushed and pulled, so I’m going to reward you with a much larger gift than what you’re asking for right now.”

They met his needs. This is truly at the heart of the art of fundraising. The organization, with Michael’s leadership, kept the conversation going, continually adjusting when the donor’s values and the philanthropic values didn’t quite mesh. All donors have their own values, interests and motivations. Meet them where they stand.



The Tail Wagging The Dog

What happens when your donor's vision and dreams don't match the organization's priorities? It's a delicate and tricky situation to find yourself. Brett Beck, who serves Providence St. Joseph Health as its Vice President for Philanthropy found himself in exactly that situation.

His donor's capacity would have allowed just about any level of philanthropic investment. Yet, even though he was somewhat engaged with the organization, this donor never gave a gift. Never. Actually, this donor never showed any interest in any of the hospital's initiatives.

As Brett say, "You could talk until you were blue in the face but it went nowhere." This isn't actually an unusual situation for fundraisers. Our job is to marry donors' values to our organization's priorities but that sounds a lot easier than it is!



Finally, this donor mentioned his interest in pediatric food allergies. This was definitely not on the hospital's radar—just think about how many capital priorities a hospital or health system has—equipment, facilities, research. Not to mention the incredible thought and work that went into creating its strategic plan. A plan that definitely did not include focusing on pediatric allergies. And to be sure, most organizations face the challenge of prioritizing projects to meet the needs of those it serves. It's always a case of having more projects than funding.

But, Brett saw an opportunity to work with an incredible donor with an incredible vision. For the next two years he discussed, researched and talked with dozens of people to see if they could make this donor's dream happen. And it happened.

The ideal is to always put the donor's interests above all else. The reality is that sometimes that just isn't possible. Brett took a long view and worked diligently to accomplish the donor's aspirations while always respecting his organization's priorities and resources. That's a dance that is very difficult to learn and even more difficult to achieve.

Donors want to see and feel the impact they are making through their philanthropy. It's our job to help make that happen. Give them a true voice. It isn't easy and it isn't fast, as Brett's story teaches. But it is essential that we try.

The donor established funds for research with a very dedicated physician. There's now a yearlong wait to get a spot in the program. A program that has cured food allergies that five years ago were deemed incurable. **Wow.**



BORED Meeting

Is there anything else worse than a bored meeting? I mean bored, B-O-R-E-D. Bored. They are boring, I have been to more boring meetings in my career than I would even want to remember. So, this is a typical board meeting from what I have seen. They come in, they get their coffee or juice, they sit down, they're brought to order, and the staff starts talking. Then an hour later – hopefully it's no longer that, the staff finally shuts up. “Any questions? No? Goodbye! See you next month.”



What could be worse? Really, we just have these fabulous people in a room for over an hour and what did we do? We talked at them. Think about what your board meetings are like – are they boring or are they inspiring? So look at your agenda, does it start with the finances? You know, consent agendas were made for a reason – those things that you really don't have to talk about unless there's something going on that's out of the norm. Put your financial report in the consent agenda. Stop talking to the board members and let the board members talk. Let them talk about strategy, let them talk about their ideas, let them run the meeting. Have a mission moment. Start every meeting with a great story about something your organization did that they helped make happen and that made a difference in people's lives. Let them give the reports. Let them talk.

We had a meeting one time where I counted. The meeting was an hour and a half long, which in and of itself is a crucial crime. I calculated that board members spent all of six minutes talking. Six minutes! So, I'm thinking maybe that was turned around a little bit and we should have let the board members have their say. After all, they're running the organization, not you. We changed at the agenda to make it an actual board meeting – not a staff meeting with board members present.



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We started out with a great story. We had a football player come in who had become involved with the rehab program. He brought in his little son, who looked like a twig compared to his dad. His son had used the rehab program. He said, “Look at what you’ve done for my son and what you’ve done for my family.” There was not a dry eye in the house. That started the meeting! That moment transformed the entire meeting. Board members were really present, in a moment that said to them “Wow, what I’m doing makes a difference. I’m involved in an organization that is hugely impactful for so many people and I’m making it happen.” Just that one moment made it happen.

Then we went on to a discussion of strategic planning – what was our plan? But we didn’t talk and talk about the strategic plan, the measures and the goals. All those things are critical but those are staff things. What the board members talked about were results. So, when you’re talking about things like, that just remember that Martin Luther King, Jr. said, “I have a dream.” Bring the dream to your board members and let them enjoy it. Then, provide the opportunity for them to make it happen.



Be A Party Pooper

Don't have parties. We've all been there – we've done the big events, the big gala, the big auction, the silent auction, the auction before the auction, the auction after the auction and the paperwork that keeps going for 12 months after the auction and barely gets done before you're planning the next auction.

Embrace being a party pooper. Events are great in their own way. But having big events dominate your time really is not doing justice to the opportunity you've been given through your position to make an incredible difference in donors' lives. Having big events is a great way to have a lot of people in a room. But unless you're going to do something amazing with those people in that room, you've just wasted a lot of time and resources.

I'm not saying don't have events. You should. But think about having small, intimate, really great events where you totally have the opportunity to get to know people. I'm going to give you an example – a donor wanted to have a big event, so we reluctantly did. It was a mess from start to finish. Every horror story you've ever heard about events, it was this one.

We had an all-day circus for kids, we had games, and we had a public "gala." At night, we had a big gala in a tent with bands. The generator went out. There was no food, no bands. It was horrible. You know how much we raised? Nothing, not a thing. Did we meet any new people who wanted to participate? No, not one.

Fast-forward 5 years. Now we're having an event, but guess what? It's at a board member's home. He's invited 10 couples to come and hear about a brand-new project that we're working on at our organization. The CEO is there to talk about the organization. The head of the project is there to talk about the project. Do you know how many new people we found from that one cocktail party? Twenty. He invited 10 couples, we met 20 people. Guess how much we raised that night? \$1 million. One couple left having committed a million-dollar gift that night. Four other couples followed close behind with their own gift.

Consider putting your resources into small socials, small parties where people can talk, really get to know each other and sincerely hear about the great things you're doing.



Never Ask For Money

One thing I wish that somebody had told me a long time ago is “never ask for money.” Doesn’t that sound weird? You’re a fundraiser. Of course you’re talking to people about money for worthy causes. I’m here to tell you, that’s wrong. Never make money the key conversational topic. What you want to talk about is mission. You want to ask people to look at your mission, to look at the people they’re helping. You want to ask people to look at the big picture. You want to ask people to be part of something bigger than any one individual. You want to ask people to ensure their values, what they believe in and what they feel is important in their lives. Continue beyond their lives. But never are you asking them for money. You wouldn’t consider a hammer the house would you? It helps build the house but the house is the important thing—not the hammer. It’s just a tool that helps build something amazing. Money is just one of the tools that builds hospitals, universities, and social safety programs.

Ask your potential donors about their...



I was talking with a donor over lunch. I had no intention of asking for a gift. We were just chatting. She said, “Tell me more about that project.” So, I told her. She said, “You know, I’d really like to learn more about that and be part of it.” I never asked her for money. I did spend a lot of time telling her about what would be different if the project succeeded.

Another donor. I brought project after project to him. Nothing. He was not interested in anything. After about the 10th time, I thought, “I give up. I don’t know what this guy cares about.” Now the science of fundraising told me to move him off my list. To move on to other donors. But, I liked him. He was super interesting with some incredible stories about his life. So, I kept meeting with him every month or so. One day I was enjoying his company and I said, “I’m sorry, I’ve got to leave because we’re having a celebration to open a new program we’re starting. He asked, “What’s the program?” I explained, “It’s for seniors who can’t get out of their homes much, who need friends and a little help.” He said “Well, I’ve got time. I’ll come with you.” So, he came over, bounced around and chatted with people who were running the program. Long story short, he wrote a 6-figure check on the way out. Guess what? That’s what he was interested in. But I never asked him for money. If you want to be truly successful in a way that’s respectful and inspiring, don’t ask for money. Ask for something much, much more valuable—their hearts.



Don't Say "No" for Your Donors

"They won't want to give." We've talked to them before, but they aren't interested."
"Everybody in the entire county asks them for money."

Have you ever been in a meeting discussing potential donors for your great cause and heard the above statements—or many more like them?

Scott Fortnum has. He believes that a large part of the journey in fundraising is not to use your own filters to decide what a donor might or might not do. "I met a donor along with a volunteer. We knew the donor had capacity to make a gift, but we also knew that our project was not at the top of his list of areas to support. Yet, when asked, he said yes. In fact, he agreed to the gift on the spot. Not only that, he agreed to a huge gift—much larger than my annual salary at the time."

Scott's perspective about what constitutes a major gift took a major revamp that day. He was applying his filters and thus setting up expectations for his donor that had no basis. Scott realized that it doesn't matter what fundraisers think and that they often project their own viewpoints and experiences onto the donor.

The Point:
**DON'T SAY NO FOR
YOUR DONORS.**

Another experience Scott shared is about one of his organization's physicians who came to the Foundation to talk about a research project. It was a very narrowly focused project that wouldn't interest a large number of donors. So, most of us would have gently turned him away. Why? Because we talk a lot about what projects might be attractive to donors. Whether or not a project is "sexy" enough. Yep. We've all used that terminology!

But Scott—because he understands the art of fundraising—went on a gift call with the physician to ask for a lead gift of \$250,000. The donor jumped on the opportunity to be part of something so singular and so important. Not only that, at the event celebrating meeting the goal to move forward with the research, the lead donor got up to speak. His first words were "I'm so glad Scott called!" He went on to tell the audience, "This is a great opportunity to be part of something; I'm so excited about the impact this project will have."

So, the next time you are convinced "not to impose" or that "it's uncomfortable to ask," please remember that you are doing yourself, your profession and, most of all, your donors a great disservice.



It's All A Lot of Talk

Rich Napolitano leads marketing and philanthropy for the Greater Lawrence Family Health Center. His organization provides critical health services to vulnerable citizens throughout the region. They don't do this alone, of course. "It takes a village" resonates here loudly and successfully.

Rich started his career at an independent school. In the middle of a campaign he visited with a donor who had given consistently—he was a 1947 alum. He came to every reunion. He had a business he worked to success through hard work and determination. He also credited his success to his school. He wanted to set up a scholarship fund. Through numerous conversations, it became clear that the best way for this donor to achieve his dream of scholarships was to put one of his homes in a charitable trust. That trust became a \$2,000,000 scholarship fund.

The Conversation



The conversations Rich had with this donor covered a myriad of gift ideas and scenarios. It was only through getting to know the donor that they landed on the best outcome for the donor and for the ultimate scholarship recipients. The donor was able to make a much more significant gift than even he thought possible. Those conversations led to a deep and long-lasting impact.

Now, working with grateful patients, Rich puts this experience to great use. He talks with patients. He talks with caregivers. He talks with donors. He connects though story-telling, intertwining the mission with its impact on people.

You just never know. We have such great tools these days. Algorithms that tell us patterns of giving. Databases that capture information about programs and donors. We have wealth screening and research tools. Yet, at the end of the day, what we really have is conversation. What we really need are relationships. What sustains these relationships is conversation and what sustains these conversations is trust.

The tools support relationships but you can have them without tools. But you can never have relationships through tools. Tools are a blessing because they support building authentic relationships that create meaningful conversations that lead to impact. Money is a tool. Philanthropy is not about money. Again, that would be saying that the hammer is more important than the house it was used to build. By all means, hammers are important. But they don't have any use if there isn't a dream attached.



How do words affect your mindset? How do words affect what you do? It doesn't seem like they're very important, right? You're having a conversation or maybe writing a note. No big deal.

Even though these phrases can be funny and common – they really do a serious disservice to you and especially your donors. You’re telling them that you’re hitting them up and twisting their arms, when really, aren’t you just creating an opportunity for them to do something they wanted to do. I’ll tell you right now, it doesn’t do any good to say, “Please don’t say that.” I tried it, it doesn’t work, it just makes people want to do it more to irritate you.

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Bad Things Can Happen

Michael Blimes leads a stellar philanthropic program at Rosemont University of Health Foundation. He's worked as a consultant and as a front-line fundraising executive. He's experienced and talented. His successful career speaks to that and says without saying that he knows a thing or two about the art of fundraising.

But, sometimes, no matter how talented, experienced and smart you are, things can go wrong. Michael was working with an incredible organization. He enjoyed an amazing team of fundraisers, great leadership and a dedicated and committed board of directors.

Philanthropy so necessary to fund the mission had increased from \$6,000,000 to \$10,000,000 annually. And that was just the start. In comes a \$34,600,000 bequest. Wow! Don't all fundraisers dream of things like that happening? Well, of course we do!

The donor was unknown to the organization and Michael felt badly that there really wasn't a way to thank the donor. So, he created a Society in his name. It was really well received. But then new leadership came in. The Board brought in its own leader. The Board also added members who didn't align with the mission or understand the value of putting donors first.

The program died. All the work, the blood and the sweat turned to tears. A lot of good people left. The Board began

managing the organization. Gifts were redirected toward a new vision and a new mission.

Unfortunately, this can happen all too often and it happens quickly. People change, leadership changes, board members change. It's one of the realities fundraisers face and it's one of the most difficult situations to manage.

That's why it's so important that roles and responsibilities are clearly defined. Making sure you have clear job descriptions and expectations can go a long way toward avoiding programs and people going off the rails.

But, bad things happen. Even if you've done everything right. Even if you've been successful. The art of managing something like this or even just managing a rogue board member or donor is what you need and what will bring you out the other side.



There's Always Enough Money for a Great Idea

Allie Phillips knows a thing or two about dreaming big and making big dreams happen. She is an internationally recognized author, attorney, educator and advocate for animals and vulnerable victims. She received the 2018 Trailblazer Award from Urban Resource Institute and was awarded as a Top Defender of Animals in 2015. She is a legal expert on the linkage between violence to animals and people.

Being a philanthropic representative sometimes will take you in directions you may have never thought possible—which describes Allie's philanthropic journey. She was working as an Assistant Prosecuting Attorney when she realized a serious issue.

In her role as an attorney, Allie was front and center in a lot of domestic violence cases and wanted to help—she just wasn't sure how. She also saw that at most domestic violence shelters there were no options to keep beloved pets.

Once she joined a not-for-profit, national organization, Allie began thinking about how they could address such a serious problem. Her organization was never intended to shelter domestic violence survivors' pets and, sadly, many returned to their violent homes precisely because they had nowhere to keep their beloved pets.

She was really on to something very big and very important. Unfortunately, the organization she worked for went through some turbulent times and her idea to create shelters that welcomed pets was never fully realized.

That didn't stop Allie! She took a leap and began her own program called Sheltering Animals & Families Together (SAF-T)[™] which is the first and only global initiative guiding domestic violence shelters on how to house families together with their pets. SAF-T enables more domestic violence victims to leave abusive households without leaving their pets behind and at risk. SAF-T also celebrates the human-animal bond and how family pets can provide comfort, reassurance and healing.





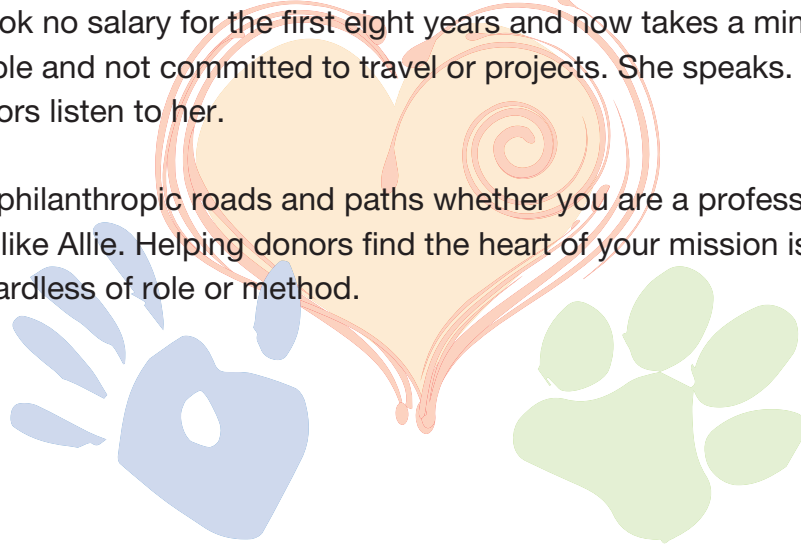
LEADERSHIP TALKS

SAF-T was created in recognition that families in violent situations often have pets and do not wish to be separated from them when fleeing their abusive environment. In short, her big idea has saved countless lives. So, what started with four shelters is now a world-wide program with over 200 shelters in the United States alone.

The most interesting thing about Allie is that she doesn't raise money. She never asks for donations. Her mission speaks for itself. She gets grants, she gets private donations. She doesn't have to "sell" anyone on her mission. She lives her mission and therefore has become the epitome of a philanthropic leader.

Allie's heart is her mission and she has given the time, creativity and drive to bring her idea to reality. She took no salary for the first eight years and now takes a minimal salary only if funds are available and not committed to travel or projects. She speaks. She trains. She listens. And donors listen to her.

There are many philanthropic roads and paths whether you are a professional gift advisor or an entrepreneur like Allie. Helping donors find the heart of your mission is at the heart of the profession—regardless of role or method.





How Do We Recognize the Person?

Recognition is so difficult. It is the hardest thing. I've spent hours agonizing over it. I will tell you that one of the things I think is important is to remember that one size does not fit all. So, it's great, fabulous to have that central recognition system or put the names on a plaque on the wall. Do all of that, it's really important. But try to get more meaningful. Try to really get into what is meaningful for a donor.

One of my board member's wife was ill. She was very ill. He was very worried about her. It really showed. I asked if I could stop by and say hello. I did and, while I was there, she shared how her grandmother had made up this story about a butterfly and told her that story every night at bedtime.

She was so happy reminiscing and I said, "Tell me the story." So, she told me the story about the butterfly. So, after the visit, I wrote it down, called a friend who is a great artist and we made a book. We made a book of this story with artwork, the whole shebang. We had it printed – a local printer agreed to do it as a gift – we made up 25 copies of this book. We invited her friends to a special lunch, and presented her with this book. I'll tell you what – no name on a wall ever meant as much to anybody as having her grandmother's story, in print, with art and shared with her closest friends.

I've stood in line for autographs, gone out late at night to find banana popsicles, and even arranged for a horse to visit a donor in the hospital. And, I loved every experience.

So, dig deep, think about it. It cost almost nothing to create such a meaningful experience for these donors. Take some time to really consider what unique idea would create a memorable experience for your donors.



Let's Kill "Planned Giving"



One thing I want to suggest to everybody in the fundraising field is to kill planned giving. That's right – kill it, get rid of it, stop talking about it, stop worrying about it and stop being afraid of it.

You know, planned giving is shrouded in mystique and an aura of being so critical and so complicated. You need to bring in lawyers, and accountants and it conjure thoughts like, "It's so scary, maybe we don't want to touch this." Well guess what? It's just a way of giving.

If a donor walked in and gave you a check, would you be frightened? No. So if a donor comes in and says, "I want to talk to you about how I can make a significant gift." Forget the words "planned giving."

All they do is create a perception in your mind that now you have to find all these other people to do this because you can't. But you can. The most common planned gift is a bequest. I can't tell you how many donors have come in and said, "I want to do a significant gift." My first words are "Have you named us in your will?" or how about "Do you have a life insurance policy that you're not using?"

Just to give you an example of how this works – one donor came in and he had heard all about charitable remainder trusts and he thought this was the thing for him; this was what he wanted to do. I said, "Great, I love it."

"Charitable remainder trusts are very helpful. They're wonderful tools. Tell me though, what do you want to accomplish? What are you trying to do" He said, "Well, I just want to make a bigger gift than I could using cash." And we started talking and lo and behold, guess what? He had an IRA that was pretty significant in assets. But guess what? Less than half of that would go to his heirs. He was not going to get that money to his heirs no matter how much he tried.



Let's Kill "Planned Giving"

But I said to him "You know, the assets you're thinking about putting into a trust are going to be much easier to pass on to your heirs. And the IRA isn't. They're going to end up paying a lot in taxes. So how about you give us the IRA, which is the equivalent of assets you were going to put in the trust, and name your children as the trust beneficiaries?" Simple. He didn't have to have tons of hours with attorneys and accountants. He just did a simple gift, signing a signature on a beneficiary line. So, don't always go complicated. Planned giving is not about complicated. It's still all about—always—what's in the donor's best interest. So, remember that and keep it simple.



Full disclosure. I am not an attorney, a certified financial planner or an accountant. So, when donors do have more complicated needs I definitely always talk over the ideas with them and send those ideas with the donor—to visit his attorney, financial planner or accountant. The point is, you do need to understand the giving vehicles people can use to make a planned gift. You do not need to go to law school. Just be good friends with someone who did! And make sure donors always get their own professional's input on any gift structure.

In the end, his IRA gift was easy to achieve. It doesn't have to be complicated! I've done some fairly complicated gifts and I'm sincerely grateful for those who have the legal and financial skills to structure them—got to love planned gift officers. They are great allies.

The point is—don't be afraid. You've got this!



Capital Campaigns: Be Ready to Pivot

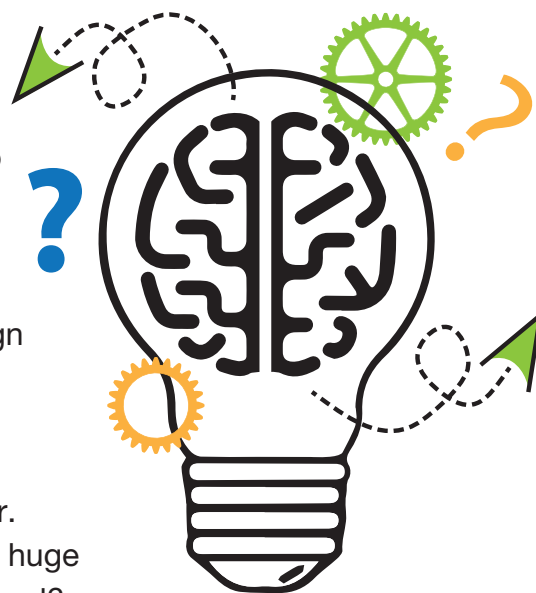
I really like talking with other fundraisers about their capital campaigns and how they're going. I have to smile when they tell me, "This is bad, and I don't know what to do." Every campaign that I've been involved in—and I've been involved in over 20 major capital campaigns—every single one of them has gone bad at some point in the campaign. It stalls, people leave, volunteers quit, things happen. It just is never smooth sailing, never.

One thing I finally figured out when I was about halfway in on my campaign trials—This is going to go wrong. We're going to have problems. This is going to turn into a mess. So let me figure out if I can proactively try to counter the mess I know is coming. Sounds silly. How can you know what to do if you don't know what's coming? But you do know what's coming. The campaign is going to stall. Something is going to go wrong. So, what are your strategies in case?

I was in the middle of the largest campaign in my career. It was huge. We were building a brand-new hospital—a huge project. And right in the middle of it, guess what happened? The economy collapsed. My campaign chairperson's company had made a huge pledge and he was doing a great job motivating others to consider participating. But, now, he was out. He had no time to do anything except try to save his business. His contractors were reneging on jobs; they were stalling and stopping jobs. He had to go save his business.

Suddenly, there was no one leading the campaign. People were freaking out "We have to stop, this is so bad." I was freaking out, too. But I thought—you know what, everybody is going to stop raising money, so how about we just keep going? We can still make this happen.

We spent a lot of time talking about how we might salvage the campaign—meaning the new, state-of-the-art hospital people in the community were excited about and the patients deserved. We must have spent hours brainstorming. Really, it was hard not to throw in the towel.





Capital Campaigns: Be Ready to Pivot

But, rather than giving up, we had a big party with all of the donors who had thus far given a gift through the campaign. We had a formal passing of the gavel from the Phase 1 Chair of the campaign to the Phase 2 Chair of the campaign—and yes, we made up a new phase and new chair. The Phase II chair was a well-known and loved philanthropist who, once more, stepped up to save the day.



Then we went back to the donors who had given gifts of stock—which obviously had lost value. We went back to them and gave them options—would you like to give in a different way with a different vehicle? Would you like to add a couple of years onto your pledge to give you time to recover? Those who had made gifts with other assets, we asked—Would you mind adding a year to your pledge to help us through this bad time?

It was one of the most amazing things. Everybody stepped up. Everybody did the best they could. We prevailed and we ended up over our goal. The moral of the story is—Be prepared to have everything go wrong and have fun doing it!

Remember the mission. Remember the project and what it means for those you serve.

Persevere!



Donors Are Not Your Friends

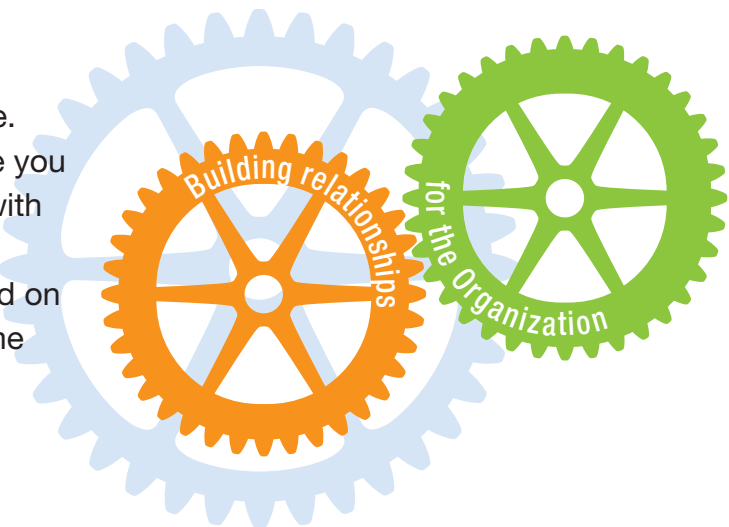
I've talked to a lot of fundraisers who don't think that's true but I'm telling you it's a mistake to think of your donors as friends. You need to keep that invisible wall. Just like a physician keeps a wall between their patients, or a teacher with their students. You have to keep that little bit of a wall between you and your donors.

I had a donor/board member who was the nicest woman in the world—loved her, loved her sense of humor, loved spending time with her. We went to a fundraising conference together. We had some spare time and she said “Well, let's go shopping.” We start shopping and guess what? The stores she shops in were nowhere close to the stores I frequent. So, she's dressing me up—and I want to mention that this woman had 4 sons, no daughters— so she was having a great time. She's urging me to buy, buy, buy. Finally, I looked at her and said, “This is really out of my price range.” She said, “No, no, it's okay, I'll get you something.”

Whoa, stop. Definitely crossing the line. I looked her in the eye and said, “I love you so much, but I cannot afford to hang with you.” I laughed and continued, “I can't afford this kind of clothing so let's head on over to JC Penny's and we'll have some fun there.”

The point is that you have to respect that line. It doesn't mean you can't be friendly, it doesn't mean that you can't have good, fun times with your donors, but it does mean that you have to be careful to always remember you are representing your organization—not you. If you left the organization that donor should stay with the organization because she cares deeply about the work it does. Not about her friendship with you. You are building relationships for the organization.

Always respect the difference.





The Love Of Humanity



John Drake has spent 34 years at Baylor Scott & White Health. He knows that all ships rise with the tide. He knows that having big-dream projects for donors is key to engaging philanthropy. He knows how to help administrators understand the philanthropic process and how important it is to the organization's short- and long-term success. He always knows that philanthropy is an attitude and fundraising is a reaction.

Early into his time at one of his system's foundations, a donor came into John's office. This donor's father had helped found the hospital and she had been involved years before in civic clubs to help during the organization's earliest days.

On this visit she wanted to know what additional gift amount would be required for her to reach the President's Club giving level of \$100,000. She wrote a check for \$30,000 on the spot and then told John she would not make any other lifetime gifts. However, she indicated that in her will was a bequest that would bring her total giving to seven figures. After revealing this information, she indicated that she never wanted to speak of it again. She didn't like thinking about death. John respected her wishes.

One Sunday afternoon less than a year later she called him. She wasn't feeling well and wanted him to take her to the hospital. He did, but only after offering repeatedly to call an ambulance instead. He waited while she was admitted. He waited to see how things were going. The surgeon finally came out and asked John who he was. He explained. The surgeon told John to contact her family as she likely did not have long to live. John did. The next day he visited her in the ICU. She recovered, much to John's joy.

During her post-surgical recovery, John checked on her in the mornings when he delivered a strong, black coffee (her favorite drink) and The Wall Street Journal. But a nursing manager called John a few days into her stay and told him he needed to stop visiting. The nursing manager reported that the donor had told her "the fundraiser is hovering around me waiting for me to die." He followed her wishes knowing that sickness brings on vulnerability and fear which can cause people to say hurtful things they don't mean. John says this is one of the most important lessons that healthcare fundraisers can learn. Instead, he sent his team members to check on her and deliver a coffee and the paper—though less frequently. About a month later, when being discharged from the rehabilitation unit, the donor asked John to visit. She asked, "Why did you stop coming to see me?" He replied, "I didn't want to hover." They both understood that he had honored her wishes.

What sunshine is to flowers, smiles are to humanity. These are but trifles, to be sure; but scattered along life's pathway, the good they do is inconceivable. Joseph Addison



The Love Of Humanity

Six weeks later, this donor showed up with a gift for John. A Waterford centerpiece bowl. He couldn't accept it, of course. But she was adamant. "You saved my life," she said. So, he asked her to donate the bowl and he then purchased it from the foundation. She continued bringing gifts periodically until he asked her to instead simply make gifts in his honor to the foundation. Then he recruited this donor to join the foundation board. She served eight years on the finance committee and her keen eye and investment expertise made an impact. She loved investing wisely.

She began to have health issues again. She was admitted to the hospital more frequently. He took her coffee daily. One morning, she told him her attorney was coming to the hospital and that she needed chairs for him and her executor and a witness. She was changing her will. He arranged for the chairs and the privacy from nursing check-ins during that visit. He asked no questions. He respected her wishes.

About a month later and toward the end of December one year, the donor was again hospitalized. Before leaving town for the holidays, John stopped by for what he felt certain was a final visit. "I'm going into hospice care," she said, "and I don't know how I feel about that." John simply replied, "I understand."

When they parted company, the donor said, "I love you." John replied, "I love you right back." It was an exchange of both words and high esteem between them that had been repeated hundreds of times since her discharge from the physical rehabilitation unit so many years before. These were the last words they shared. Though John spoke with her family by phone during his travels, the donor no longer could communicate. She passed away eight days later.

John managed to be her friend through a lot of ups and downs, and he managed to maintain the boundaries between being her friend and being a philanthropic representative of his organization. They had enormous respect for each other. With her bequest, her giving totaled more than \$1.1 million to help the hospital she loved.

This deep personal regard between John and his donor illuminates the joy and humanity that lies at the heart of philanthropy. John built a genuine and deep relationship with this donor. It was never about the money. It was always about the relationship and trust—with John and with the organization he represents.

Building these types of authentic relationships with donors is truly the "love of humanity."



What's Your Legacy?

So how do you help donors leave a legacy? That's a really common question. It's a common thing to think about in our field. But I want to turn that around a little bit. I want you to think about how you as a fundraiser are leaving a legacy. What are you doing to make your impact on the world that you live in, day in and day out?

I had a donor couple one time that I had been really stewarding, sincerely creating a relationship. I was sure their gift to our organization would be huge. They had been really interested in a lot of our programs so I felt pretty confident. We sat down to visit about what they might like to do. Out of left field, they said, "You know, here's where our hearts are. We had this incident in our family where one of our nephews was burned very badly in a house fire. It was such an awful experience for our entire family. We want to make a difference for kids who are going through something like that."

Guess what? We did not have a Burn Unit. We had nothing that this couple could support that would fulfill their particular passion. I called a colleague at an organization specializing in treating burn victims, especially children. I put them together and the donors gave a very significant gift to my colleague's organization. Was I bummed about not getting a gift for my organization? You bet. I also felt really good.

Why? Because I helped make that happen for my donors. My legacy is striving to always put donors' interests first and making sure that what they're doing is right for them. For me, that always has to be the most important thing.

Think about what your legacy is—your gift to your donors. By the way, a couple of years later, they gave our organization a very significant gift as well. So, in the end, karma works. Every time! Doing the right thing always leads to success.





We're All In This Together

I started my career right out of college at a Fortune 500 company. I was doing business development and marketing. As the years went by, I was getting a little bored and I was talking to a friend and she said “You know what? We need a development director at our organization.” I said “Really? Why?” I was thinking “business development.” And why would a hospital do that? Duh! She meant fundraising. She explained the role to me. I had no idea this whole world of philanthropy existed. She talked to me about it, told me about her work on the board, and what she did and why. She thought I’d be really great at this job and I thought, “Yeah, ok that’s just marketing. No problem.”

So, I took the job and three months in, I realized “ This is not marketing. I am in so much trouble. I have no idea what I’m doing.” So, I reached out to anybody I could find; I read anything I could find. The people who were writing about fundraising got a phone call from me. I said, “Look, I’m new at fundraising. I don’t know what I’m doing. Will you help me?” Not one person told me no. Bless their hearts, as my southern-born and bred mother used to say.



I joined organizations, I got involved, I went to conferences and I listened and learned. I’m telling you that is the key—lifelong learning. I’m still learning. I found great mentors along the way. Coming from a Fortune 500 company, I was really familiar with the concept of having coaches and mentors.

Yet, when I looked for a fundraising coach, there really weren’t any. So, I found people to be my coaches. It wasn’t a formal relationship—just a more experienced person helping someone new to the field.

There are now a lot of coaching and educational options for fundraisers. It’s wonderful how our profession has grown up. Still, one size doesn’t fit all. Every organization is unique; every person is unique. When you’re looking for a coach and trying to find one make sure it’s the right one for you. Make sure you feel comfortable. The connection is critical to the relationship so don’t settle for anything less.



The Psychology of Relationships and Dreams

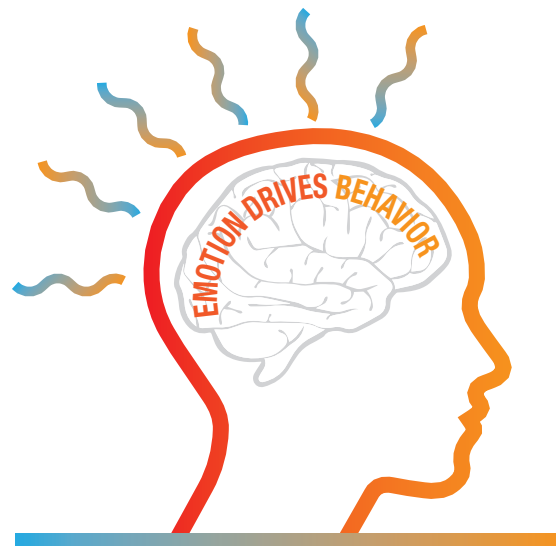
Social exchange theory is at the heart of every relationship that works. No one wants to be viewed as a dollar sign. Furthermore, when a person instantly looks at what someone else can give, s/he instantly breaks the role of social exchange and reciprocity. Essentially, all human interactions have “give and take.” When you listen to a person’s interests and needs, you are “giving.” They understand that you may want their philanthropic investment, but they also feel that you are “giving” them something by trying to make sure that they are heard and that their needs are met.

A caution about this: if you truly do not care about people and you try to use this strategy, it will come across as inauthentic. The one thing worse than being insincere is being insincere and trying to pretend that you are not. If you know that your motivation is selfish, it is much better to own it and see if the other person still wants to go for the ride.

When we make assumptions about people, we miss all of the information that touches their heart. If we view a surgeon as a brilliant physician who makes a lot of money, we miss seeing the little boy who was lonely because he thought differently than everyone else. If we see the tech billionaire and the success that surrounds her, we miss seeing the young girl who had to protect her siblings from abusive parents. People grow up, but their emotions don’t. People move on, but their histories come with them. If we really want to reach people, we need to understand their roots and their wings. When we understand these, we have

a much deeper understanding of who they are than we could obtain by learning about their current position and interests.

Simon Sinek’s book on the power of “why” found traction because it speaks to emotion as a necessity, rather than a luxury in maintaining focus. At the heart of every why is emotion. Emotion drives behavior, whether we want it to or not. Clarifying and sharpening the emotional “why” gives us the ability to persevere when we want to quit. Further, emotion can take complicated matters and make them simple.



The ideal of behaviorism is to eliminate coercion: to apply controls by changing the environment in such a way as to reinforce the kind of behavior that benefits everyone. B. F. Skinner



The Psychology of Relationships and Dreams

A strategic plan can provide a path for the emotion to walk down, but it cannot create emotion. Without a strong “why,” and emotional foundation, all of the pretty numbers and flowcharts go on a shelf.

Notice that in the suggestions on working with CEO’s, their ideas were not just shut down. Ideas are emotional. Some people are quick to verbally reject ideas. The shuts down the emotional buy-in and the creativity of the person listing them. The strategies shared here allow the person to feel that the idea was heard and recognized. Most of us know that our ideas may or may not work. Having it noted and recognized allows us to let go of it for awhile and refocus on the plan at hand.

People want to contribute. One of the early psychological theories postulates that the needs for work (contribution) and mastery (achievement) is foundational to the human experience. I used to work with many clients who had chronic pain issues. The biggest obstacle they encountered was that their physical limitations made them feel useless. “I don’t know what I bring to the table. I’m just taking up space.” For anyone who attends a meeting, they need to feel that their presence makes a difference. Sharing success stories addresses the crucial element of motivation—we stay engaged if we believe our effort shows a reward. The idea of creating an environment where board members can see the results of their effort on an ongoing basis touches the very heart of emotion. I cannot imagine the synergism that would be created if meetings were structured simply around the principles of showing results and ensuring that everyone’s voice is heard.



Dr. Tricia Groff | www.drtriciagroff.com



Leadership Mantras

You make things happen or nothing happens.

People are messy. Embrace the chaos.

Don't bore your board members.

If you don't fail, you weren't trying hard enough.

Use the CASE method: Copy and Steal Everything.

Bad things happen: learn and move on.

Reach out for help; give help to others.

Planning is necessary; flexibility is crucial.

Check your ego at the door.

Advance your mission – one donor at a time.

Have fun!

Be proud of who you are and what you do.



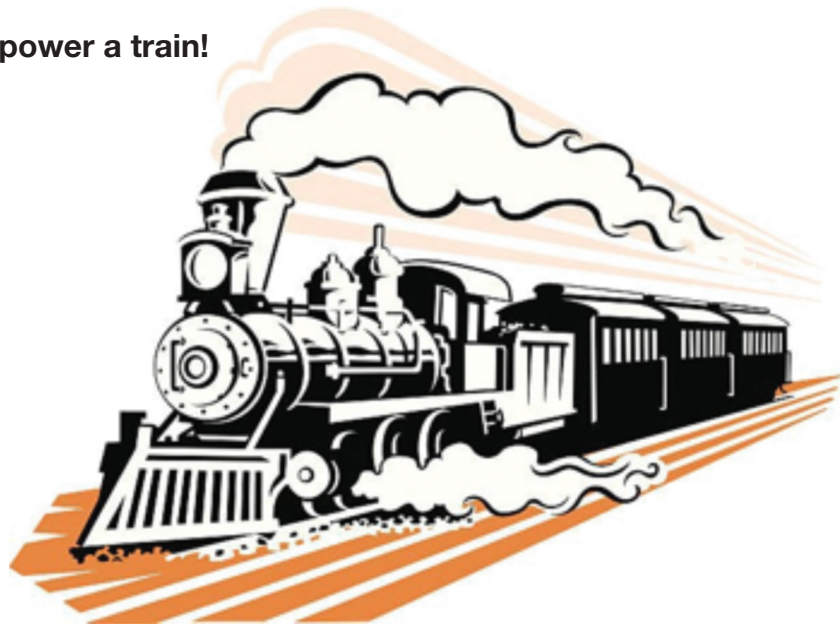
212 Degrees

A long time ago, I saw this video and it talked about how at 211 degrees, water is hot. And at 212 degrees, it boils. Boiling water creates steam, and steam can power a train. The notion that just an extra degree could transform my work fascinated me. The application of that one extra degree of effort—to fundraising, to leading a campaign better, developing a unique strategy, a plan, an annual giving plan, direct mail, planned gifts, events—has made a huge difference.

I leave you with this question and challenge you to take some time and think about it:

If you apply that extra degree across the whole spectrum of your development program—what might happen—what could be possible?

You might just power a train!



If you understand physics of how a locomotive works, that knowledge is irreplaceable. Jamie S. Miller



Achieve Unprecedented Success



AT 211 DEGREES, WATER IS HOT
AT 212 DEGREES,
IT BOILS.
AND WITH BOILING WATER, COMES
STEAM
AND WITH STEAM YOU CAN
POWER A TRAIN.

ONE EXTRA DEGREE MAKES ALL THE DIFFERENCE.



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