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Investing in
high-performance
fundraising paves
the way for success

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Here are 18 reasons
to give donors a
seat at the legacy
planning table.



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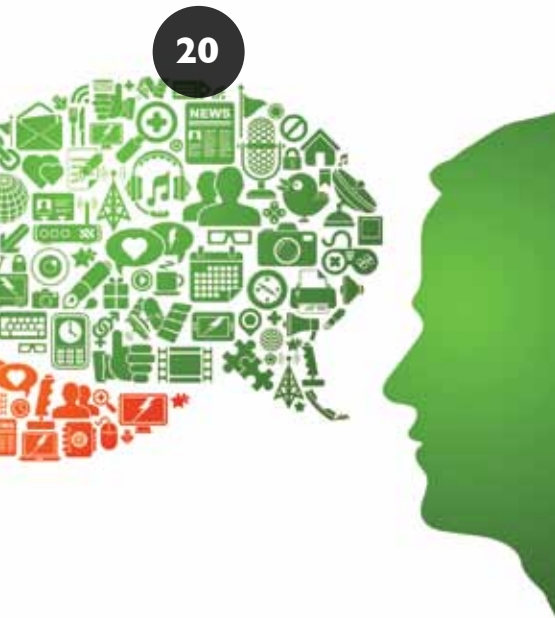
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Chief Executive Officer

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healthcare philanthropy

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The Association for Healthcare Philanthropy (AHP) is the leading authority for standards, knowledge and leadership in health care philanthropy. As the world's largest association for health care fundraising professionals, AHP represents 5,000 members who raise more than \$9 billion each year for community health services. AHP supports its members and serves the public through high performance standards, expert knowledge development and executive leadership that advance the practice and performance of health care philanthropy at both the local and national level.

Healthcare Philanthropy mission:

Healthcare Philanthropy will be an authoritative resource for health care development professionals by providing a timely, informative and insightful collection of literature that will raise the standard of individual and organizational performance. Serving as the premier forum for health care philanthropy literature, Healthcare Philanthropy will educate, empower and inspire development professionals and, thereby, help strengthen the case for philanthropic support and the mission of AHP.



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By William S. Littlejohn

Chair, AHP Board of Directors



FROM THE CHAIR

Transformation – It's up to us

When I joined Sharp HealthCare Foundation in 2002, we were challenged to capture the theme of our comprehensive campaign. We turned to the Sharp strategic plan and it became evidently clear: we were transforming health care in San Diego. And philanthropy became an investment strategy and fundamental component of Sharp's success.

The Association for Healthcare Philanthropy's current strategic plan centers on the same theme: the transformation of the association and our profession. The most comprehensive and wide-ranging plan in AHP's nearly five decades of service, it will elevate and enhance health care philanthropy in every community—across the entire range of institutions we serve and the 5,000 members who look to AHP for professional resources and development.

I hope you
will join me
in leading the
transformation
of AHP and
our profession.

Our plan also is evolving at a time of the greatest transformation of health care delivery in history, leading us to define the critical success factors for high-performance, sustainable philanthropy within this complex environment. Our planning and execution will require the development of skills throughout the philanthropy enterprise, incorporating benchmarking-based standards and outcomes.

The future of the sustainable fundraising enterprise includes further focus on areas such as strategic alignment, structured and deferred gifts, developing a pipeline of donors, creating both expectations and incentives for more productive and higher performing staff, and continuing to invest in program development for higher returns.

The overwhelming majority of AHP members represent community hospitals and systems anchored by community hospitals. Yet AHP is a complex association with equally complex relationships and orientations. The AHP strategic plan is centered on the "AHP Matrix," which incorporates member type; institutional health care delivery composition; philanthropy program size; institutional orientation such as stand-alone or systems; member experience or function; and geography. Every aspect of the AHP strategic

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plan—knowledge, standards, and leadership and engagement—addresses meeting our member needs across the AHP Matrix.

The transformation of AHP and our profession through our strategic plan will clearly establish AHP as the recognized leader in health care philanthropy across multiple platforms—including fundraising professionals, health care institutions and executives, organizations engaged in the financing of health care, donors, the media and government. And we will lead the effort to communicate the true impact of health care philanthropy across the matrix of AHP members and to the public—impact that’s measured by the funding provided and the value of philanthropic investments to the

community, not just revenue to health care institutions.


However, without sufficient resources—both human and financial—the AHP strategic plan will be limited in its implementation and effectiveness. Our plan needs to be shouldered, through association volunteers, staff resources and institutional investment.

As we work together to transform AHP and our profession, I am grounded by the understanding of the unique and powerful roles of health care philanthropy:

- Excellence in health care requires significant investment—most effectively through a combination of earnings, borrowing and philanthropy. Philanthropy has the power to leverage other sources

of funding and create a dramatic return on investment for donors.

- We facilitate the power of health care philanthropy by connecting grateful patients and families with caregivers—embracing the common bonds of giving and caring.
- We often are in the best position to be institutional champions and communicate the vision, plan and case for philanthropic support for the institution. Alignment of the philanthropic enterprise and the institution allows for effective presentation of philanthropic investment in excellence in health care.

I hope you will join me in leading the transformation of AHP and our profession. It’s up to us. 

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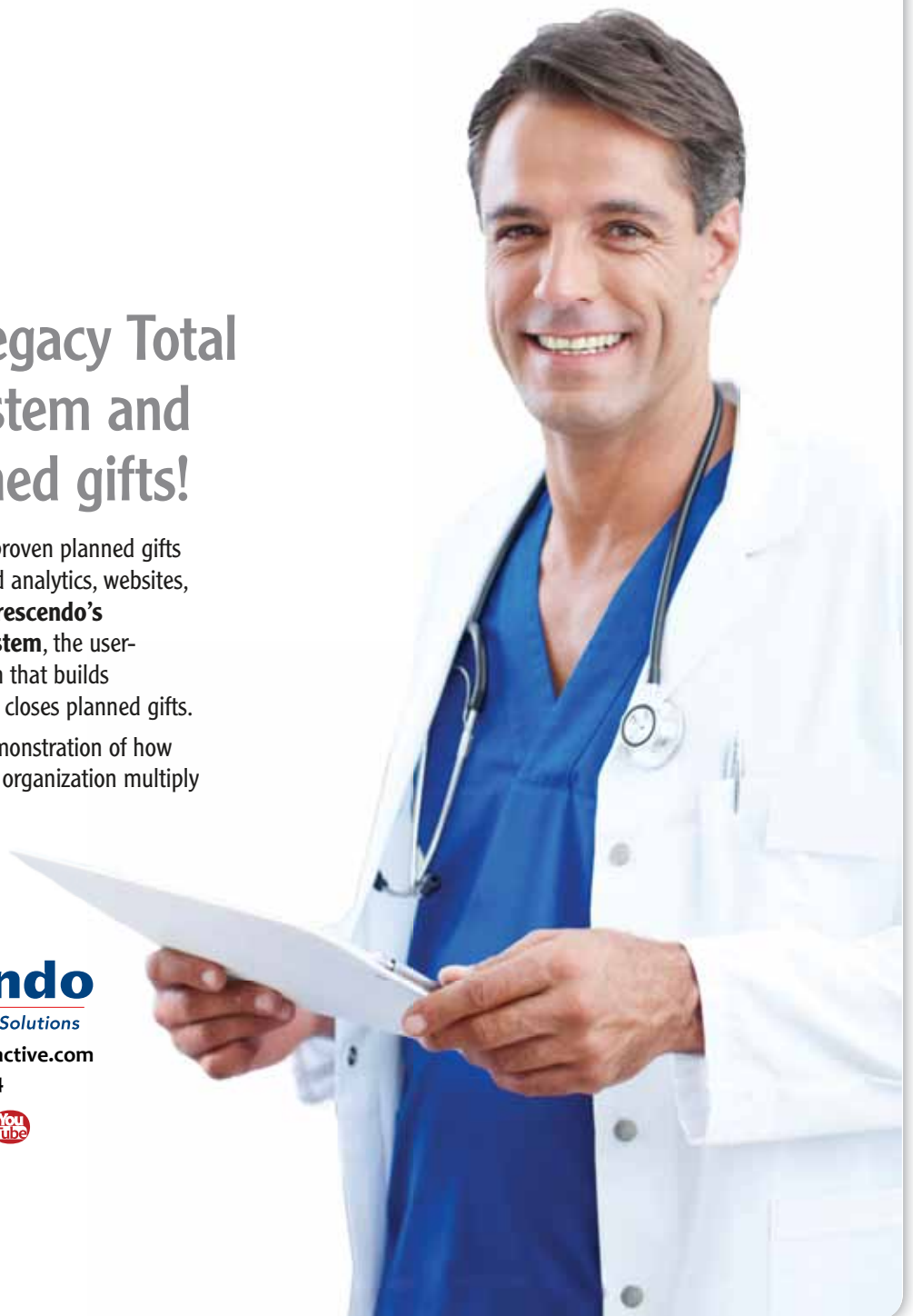
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AS I SEE IT

The knowledge and resources you need

“The next best thing to knowing something is knowing where to find it,” said British author Samuel Johnson. At AHP, we strive to be your “go-to” source of knowledge and resources in the changing and challenging world of health care philanthropy.

As you are learning, AHP is in the midst of implementing a five-year strategic plan that launched in 2011. The goal is to provide expanded and more sophisticated support to AHP members in order to improve fundraising performance and make your philanthropy program an integral part of your health care organization.

A large part of that goal is recognizing the diverse needs of the AHP membership and providing relevant resources for all segments of our profession—from smaller community hospital foundations to larger system foundations and everything in between.

One way we are meeting this challenge is through our knowledge initiative. In addition to industry publications like this journal, we are expanding member learning opportunities to enhance the depth and range of knowledge in health care philanthropy at all levels of professional expertise. Here are some of the changes you may have already experienced:

- Faster and easier access to information about best practices and the ability to search our data electronically, thanks to the redesign of the online AHP Resource Center.
- Clear guidance on U.S. patient privacy regulation, published in the *AHP Research to Practice Guide: Fundraising Under HIPAA*, with special emphasis on the regulation updates released in January 2013.

- Programming designed specifically for chief development officers, launched at the 2012 AHP International Conference.
- A specialized workshop on the keys to small shop fundraising success, making its debut at the AHP Midwest Regional Conference in May along with special interest education.
- Self-directed, self-paced education through the AHP Online Conference Learning Center.

An important, emerging project through the knowledge initiative is our system of defined career pathways for professional competencies in health care philanthropy, from basic principles all the way through executive-level skill building. Also on the horizon are expanded selections of learning opportunities, including online certificate courses, and the launch of targeted spring conferences to bring together members with similar needs and interests. In fact, AHP is developing educational conferences for the spring of 2014 that have an emphasis on executive leadership, systems development and generating great ideas.

Another focus of our strategic initiatives is standards. Our goal here is to establish performance measures as standards that are accepted and practiced across the entire field of health care fundraising. There are much greater expectations for health care philanthropy programs today and AHP is committed to elevating the profession with reporting standards supported by data, research and analytics.

To support this initiative, we published the *AHP Standards Manual for Reporting and Communicating Effectiveness in Health Care Philanthropy* in August

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2012. It defines terms and sets standards for the field of health care fundraising, from the classification of revenue sources and expenses to the measurement of the impact of philanthropic programs and various management and operational approaches. With this data we are able to determine which programs contribute to increased philanthropy.


A key aspect of the standards initiative has been the creation of the AHP Health Care Philanthropy Standards Council, whose seven dedicated members work under the chairmanship of David L. Flood, AHP board member and president of Meridian Health Affiliated Foundations. Among their

responsibilities is to establish procedures for reviewing the current standards and suggesting necessary modifications as the program expands and grows.

I am especially excited about the redesigned and simplified giving survey and benchmarking service that was released this spring in the U.S. and Canada. We intend to use the survey results to build a comprehensive data warehouse at AHP that will allow for detailed research and analytics. All of this is only possible if all our member institutions participate in the survey as an obligation to the profession. Participation across the entire AHP membership will allow the creation of significant

cohorts that will greatly benefit planning and performance reporting. I encourage all of you to take advantage of this outstanding resource and provide survey data.

If you would like to learn more about the strategic initiatives and the new ways AHP is working to meet your needs, visit our website at www.ahp.org/strategicplan. You also can speak with me or any of AHP's leaders at the AHP Regional Conferences this spring, the AHP Madison Institute or the AHP International Conference.

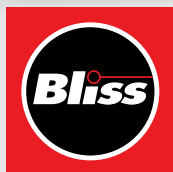
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Accelerating major gifts

Proven private-sector strategic marketing practices give fundraising programs a boost

When Beaufort Memorial Hospital's foundation wanted to shift from traditional multi-year capital campaigns to a sustained major gifts program, Executive Director Alice B. Moss and I used tried-and-true major gifts techniques while also adapting useful tools from marketing in order to drive breakthrough decision-making and actions. We also were able to tap the experience and enthusiasm of foundation board member Sherry Hirsch, a retired top executive of a major technology company where she was responsible for a large team that marketed to the financial services industry.

"In the end, success is really about managing your time. Overall, it is about building trusted, long-term, mutually valued relationships. At the same time, it is about focusing on prospects that provide the best return for your time and effort," says Hirsch.

Lessons from for-profit strategic marketing emphasize the data-driven,

disciplined, behind-the-scenes use of written and visual tools. At Beaufort Memorial, these tools were adapted to enhance the processes the foundation uses in major gifts development. The team followed carefully designed action plans to prioritize, engage and communicate with prospects and create mutual value and satisfaction.



The team's goals were to organize a dynamic and time-efficient major gifts plan, give staff useful ways to identify and prioritize prospective donors, and provide foundation board members with meaningful ways to help. This article outlines some strategies that help staff and volunteers focus on their priority prospects and make tough decisions to provide the greatest return for their investment of resources.

Triage your prospects

Hospital emergency departments use consistently applied protocols to prioritize which patients to treat first. As development officers, we can apply similar consistency and rigor as we “triage” our prospective givers.

Hirsch shares approaches she used when leading a sizable marketing team. “The most successful members of my group were diligent about focusing on their very best prospects. We separated

[our top prospects] into three levels, with level one being the group most likely to provide the largest financial return in the shortest time frame,” she explains. Hirsch suggests that development staff assign their time and resources based on these priority levels, or tiers.

At Beaufort Memorial, staff developed a master pipeline management list of a few hundred prospective major donors. From this list, 100 top prospects were identified based on their giving history, researched capacity, wealth screenings, patient experience, overall engagement, known interests and estimated time required to secure a major gift. To augment this information, staff used tools such as value mapping, relationship mapping, qualification and identifying compelling events (all described later in this article).

Next, staff triaged the top 100 prospects into three tiers of priority based in part on the projected value of their potential gift

.....

Lessons from for-profit strategic marketing emphasize the data-driven, disciplined, behind-the-scenes use of written and visual tools.

and their likelihood of giving. Level one included 30 carefully selected names assigned to Moss, who then identified from among them her top 15 priority prospects. Moss, the senior leader of this modestly sized foundation staff, also sits on the hospital's senior team and strategic planning committee and is the lead responsible for major gifts development. Working with 30 prospects is realistic for her and also strategic; focusing her time on fewer, highly targeted relationships is the most productive start to the foundation's shift to managing major gifts outside of a multi-year capital campaign.

The remaining potential major donors are grouped into tiers two and three. In many cases, what distinguishes a tier one, two or three prospect is the estimated time required to develop their major gift.

Moss takes the lead in advancing her top priority relationships and sometimes seeks help from others, including the hospital chief

Incorporating tools from for-profit marketing brought new energy and efficiency to Beaufort Memorial's evolving major gifts program. **Innovative techniques** such as **visual mapping** provided breakthrough perspectives and helped staff move quickly to make the right decisions.

executive officer (CEO), board members, physicians, the chief nursing officer or another staff member. Her personal visits and conversations are carefully planned in advance, with defined desired outcomes that lead the relationships closer to targeted gift proposals, and each contact with a prospect is fully documented.

The staff member designated as the "pipeline manager" provides Moss with a weekly list of action

steps primarily for her top 15 to 30 prospects and occasionally for those in tiers two and three. Her to-do items might include phone calls to secure visits, follow-up actions to a previous visit, meetings with the hospital CEO or a board member to determine next steps in a gift strategy or reminders to write a personal note or make a relationship-building phone call.

Staff contacts with tier two and three prospects are less frequent but no less strategic, and are designed to increase donors' engagement and interest in giving. These contacts might include time-efficient yet purposeful actions, such as an invitation to an insider gathering or a pre-planned personal greeting from a board member at the annual benefactors' recognition event.

In some cases, another member of the staff, such as the associate director of development, may take the lead with a prospect. For example, the special gifts director, who also is lead staff for planned giving, may accompany Moss on a visit when a donor expresses interest in a planned gift, and then may make follow-up visits on her own. She also might take the lead with select prospects, such as consistent givers who staff believe might be interested in planned giving, and then bring Moss into the dialogue if needed.



“The three-tier approach provides the discipline we need,” says Moss. “It’s easy to let [my] executive director responsibilities divert time from major gift activities.” This approach also could work well for full-time major gift officers, helping them manage a substantial portfolio while still focusing on their best opportunities.

Value mapping

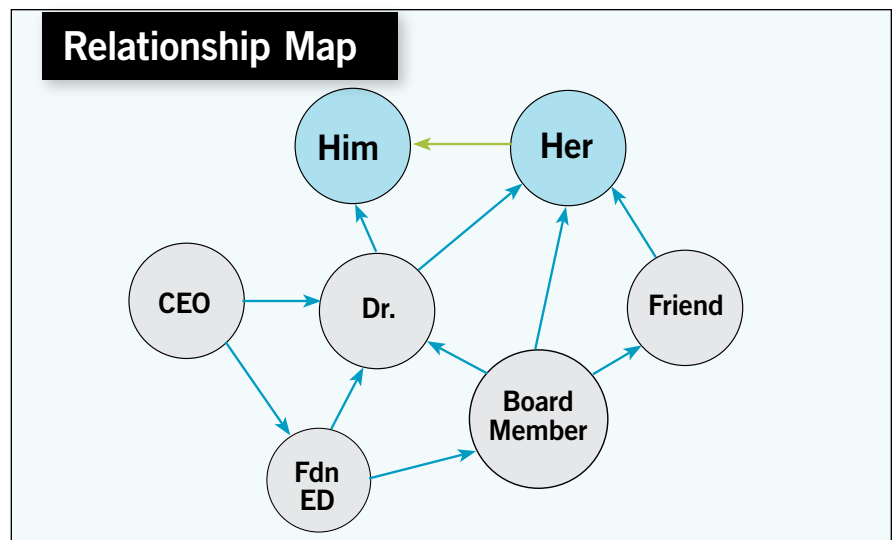
The marketing practice of “value mapping” uses visual tools to provide important perspectives about potential donors and help set priorities and plan solicitations.

“Like many people, I’m visual,” says Moss. “Mapping is an easy way to see and set priorities. It helps me stay focused on the best prospects, even if they aren’t the easiest or most fun.”

The capacity-inclination matrix—used for many years to identify priority prospects—is one example of value mapping. The donor’s inclination to give is plotted on the horizontal axis of a grid, and his or her ability, or capacity, to give on the vertical axis. The grid is divided into four quadrants, and prospective donors who fall into the quadrant on the upper right (highest inclination, highest capacity) receive the highest priority.

“Time to gift” maps also can aid in priority setting. Foundation staff review each gift opportunity and estimate the time they will invest to finalize the gift. The resulting value is placed on the horizontal axis, mapped with the targeted gift amount for each donor plotted on the vertical axis. In this case, names in the quadrant that reflect less time and higher dollar value are most likely to be given higher priority.

Value mapping also can show a measure of “philanthropic alignment” between the prospective



donor and the organization or major gifts initiative. On this grid, “value to the donor” of making a gift is noted on the horizontal axis and “value to the organization” on the vertical axis. The greater the alignment between the two, the more likely there will be a gift and a mutually valued relationship.

For example, one hypothetical donor may value having his naming opportunity visible from a major highway. This hospital has existing naming opportunities and will not have to modify its plans to offer one. The value to the donor and the value to the organization are both high, so there is philanthropic alignment.

A map of philanthropic alignment also can help guide tough decisions. For example, a high-profile prospect at a different hospital had significant resources and a high inclination to give. She asked to designate her donation to the treatment of a specific childhood disease. The gift represented high value to the donor, but it was of low value to that hospital because it had no existing program. Because the institution wanted to maintain the relationship, it decided to accept the gift and establish a new program. But within a few years, the hospital was unable to sustain the program and the

donor relationship dissolved, with a spillover of ill will among other area donors. In this case, a philanthropic alignment map might have guided hospital decision-makers to consider a more mutually satisfying plan.

At Beaufort Memorial, staff placed grids on the wall and used sticky notes to represent different donors. Information about each donor’s giving goals was written on the notes, and they were placed where the donors’ interests intersected with hospital needs. The resulting visual clearly showed where donor value and organizational value were best matched.

Relationship mapping

A relationship map is a different visual tool that illustrates existing relationships between the organization and prospective donors and helps determine the strength or nature of those relationships. This tool can lead to clearer priority setting, better choices about who should steward a relationship and more precise cultivation steps. The map, which can be represented by circles with lines connecting them, provides a backdrop to discuss important questions such as, “Who has the most influence with the prospect?” or “Who is the key decision maker?”

In one couple's case, the husband was a corporate CEO whose life was saved due to treatment at their local hospital. Initially, the suggested strategy included having the hospital CEO invite the husband for a visit based on the assumed strength of the CEO-to-CEO connection. But then staff prepared a relationship map that revealed multiple, existing strong connections between the wife and a foundation board member, shown to be a "trusted influencer" for her. The wife, the primary decision maker, also had expressed her gratitude for her husband's physician. The visual representation of these relationships led to a winning strategy in which the board member, physician and staff worked together to secure an initial six-figure gift and the promise of more to come. The relationship map used in this case is provided on page 15.

At Beaufort Memorial, "relationship mapping helps us be more confident in our decisions and plans," Moss says. "In one case, it helped us decide to limit time spent with a prospective donor as it became clear our linkages were weak."

Qualifying prospective donors

In marketing, qualification includes conducting background research on targeted prospects and engaging them to establish mutual value. Prospective customers are qualified when they indicate interest.

Often foundations qualify prospects based on facts like their giving history, estimated capacity and patient experiences, and then use this information to determine the prospect's priority in their gift cultivation plans. And as in marketing, true qualification also requires a cue from donors about their interest in providing support. Here's an example: After

closing an initial exploratory visit with a prospective donor, staff ask to return to discuss programs that need support, and the donor agrees. This potential donor would be qualified as a priority prospect. This definition was adopted at Beaufort Memorial and played a key role as staff refined the list of its top 30 prospects.

Testing strategies and monitoring progress

A written gift strategy for a specific donor, like a documented marketing opportunity plan for a targeted customer, lays out cultivation milestones and other factors to guide and measure progress. The strategy may include the overall gift objective, the value of the gift to the donor and to the hospital, information the foundation needs, insights about the hospital and the gift opportunity to share with the prospect, lead staff responsible, other relationship "influencers" staff might call on for assistance and projected milestones.

"It sounds simple, yet I can't say enough about what a difference it makes to write down your objectives and plans," says Hirsch. "And once you have a written strategy, test it," she continues. "Ask someone else to validate or correct your assumptions and strategy."

At Beaufort Memorial, board members and other advisors chosen for their knowledge or relationships with prospective donors are invaluable resources for testing gift strategies. Staff presents a plan and these advisors are invited to provide candid feedback. In some cases, gift strategies are presented at a major gifts committee meeting, or small groups (usually one to three people) meet to discuss plans relating to individuals they know. Participants comment on the validity of the

plan based on their knowledge and experience in the community, providing perspectives the staff may not have.

Beaufort Memorial foundation staff monitors progress on individual plans using a visual, at-a-glance tracking sheet that reveals problems to solve, priorities to modify and time wasters. The report is color-coded based on traffic signals and shows where progress is active (light green), if a milestone has been reached (dark green), if progress has slowed (yellow), if it has stopped (red) or if new gift planning is underway (blue). This report also is viewed by the major gifts committee, comprising board members who generally have made larger gifts themselves and are committed to working closely with staff and sharing responsibility for results.

The power of a compelling event

A compelling event is an internal or external factor that drives someone to make a final decision, perhaps to invest in a product or provide a major contribution. "When there is no compelling event, it is more difficult to finalize a product or gift agreement," says Hirsch.

A donor's lifesaving experience at a hospital is one example of an internal compelling event. An external compelling event, one created by a foundation, could be a push to help a fundraising campaign go "over the top" and meet a specified goal.

Here is a real-life example: A foundation staff member at Beaufort Memorial spoke with a high-value annual donor during his hospital stay and learned he was extremely satisfied with his care. On a second visit, she learned that he had thought about making a gift in memory of his wife. In addition, the

donor had recently had great success with his business. In this case, there were three compelling events: the positive patient experience, the desire to remember a loved one and the change in financial position. Foundation staff gave this relationship top, tier-one priority, and a series of visits and carefully planned communications followed. Within months, the foundation was the happy recipient of a six-figure gift and a bequest intention.

"We would have followed up with this donor in any case," Moss says. "My understanding of the compelling events added clarity and, most of all, urgency."

Define and use exit criteria

Using exit criteria also can help major gift officers make the best use of their time. Examples of exit criteria might include receiving new information from a potential

donor such as changes in his or her priorities or ability to give, or noting that there has been no forward movement in a relationship in a predetermined timeframe.

"A common mistake is holding on too long, or spending too much time with a relationship that is not likely to lead to a sale or a gift," says Hirsch. "Letting go and refocusing on other prospects is one of the most important decisions you can make."

New energy and a fresh perspective

Incorporating tools from for-profit marketing brought new energy and efficiency to Beaufort Memorial's evolving major gifts program.

Innovative techniques such as visual mapping provided breakthrough perspectives and helped staff move quickly to make the right decisions. It is still early in the effort, yet the amount of targeted,

carefully designed donor contacts has tripled since the program began; the number of yearly major gifts (above \$10,000) has increased and stabilized and the number of planned gift expectancies has increased five-fold.

"We're still evolving," says Moss. "We've significantly increased the number of prospects with documented gift strategies, which is a huge step. We're excited about what happens next." 



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When I talk with fundraisers at national conferences, I'm always asked why they aren't getting more donations from Facebook fans. It's because social media tools are created for people who know each other to share thoughts and activities. But your organization can use these same tools to share information that adds value to supporters' lives. Once you've established a presence in the community, you can integrate fundraising, advocacy campaigns and outreach into social media efforts.

Social media is both a channel for distributing stories and appeals and a tool that ties all your other channels together—allowing you to link messages, interact with your audience and prompt supporters to spread your message to others. Social media makes it easy for people to find your information, take action, share their activities and encourage others to get involved. In the fundraising and philanthropy arena, social media is highly effective for calling attention to your cause and fleshing out your story in ways you can't achieve through a direct mail letter or public service announcement. In some cases, social media even can be used to bring in donations. The case studies that follow provide good examples of how social media can enhance the results you get from multichannel campaigns.

Autism campaign uses infographic to share information

In 2011, social media played a central role when the Dan Marino Foundation, with funding from Samsung Hope for Children, launched a social action campaign, "Team Up for Autism" (TeamUpForAutism.com) in conjunction with the first annual WalkAbout Autism, a fundraising and awareness-raising event the foundation sponsored. In WalkAbout Autism, teams collect donations to pay for their participation in a mile-long walk and community fair in the Sun Life Stadium, home of the Miami Dolphins.

Samsung Hope for Children is the fundraising and corporate responsibility arm of one of the largest technology companies in the world. The Dan Marino Foundation is a Miami-based nonprofit that creates opportunities for children and young adults with autism and special needs. The goal of the 2011 Team Up for Autism initiative was to raise awareness and funding for medical research, services and treatment programs for children with autism. Samsung agreed to donate \$5 to the foundation—up to a maximum of \$100,000—each time a person pledged support by sharing a special infographic with his or her Facebook friends or sent a tweet with the hashtag #teamautism.



City of Hope, a cancer treatment and research center near Los Angeles, uses social media in creative ways to share information and stories that boost fundraising efforts and draw attention to research.

Steps the organizers took that were crucial to the campaign's success included training staff on how to use social media tools for maximum effect and establishing a team of advocates before the campaign was launched. Building momentum ahead of time paid off: In just 72 hours, Team Up for Autism reached the goal of a \$100,000 donation from Samsung Hope for Children—far quicker than the original goal of one month. Social media served as a connective channel in the effort, pulling together the shareable infographic, the TeamUpForAutism.com website and other content.

Using social media to spread information and raise money couldn't be successful simply by launching the campaign and hoping the response would take off on its own. The Team Up for Autism campaign team did the following:

Multichannel **strategies** for you

Follow these five guidelines to help plan an effective strategy, regardless of your organization type and the goals for the communications.

- **Be valuable.** Supporters only will engage if your content or your call to action offers a benefit. This does not mean you have to give prizes or engage celebrities in your campaign, but you must clearly communicate the value that participation has for the community.
- **Be personal.** Whether in the kinds of content you share, such as a person's story, or the approach you use to address supporters, find ways to make content and communications personal. No one walks up to the City of Hope's entrance and tries to talk to the wall—they go inside to speak with another person. The same principle is true online—people want to connect with another human being.
- **Use the platform well.** The Dan Marino Foundation invested ahead of time in educating staff on the tools they needed to use for their campaign. You, too, should devote time to become familiar with the workings of popular platforms so you can learn exactly how the community uses them, what the common practices are for engagement, how each platform's tools work for creating and sharing content and the best ways your organization can benefit from each platform's functionality. Social media tools will continue to change and develop;

give yourself time to understand the potential and the options available before launching an organizational presence.

- **Create connections.** Just as City of Hope used customized pages, hashtags and direct links to connect content across channels, you will need to create connections from channel to channel and story to story. Your supporters will not invest their time to search for your content, so make it easy for them. Be sure that the path from one piece of content to the next, or from one channel to another, is clear and easy to navigate.
- **Nudge people forward.** If you build it, they will not automatically come. Stay actively engaged across all channels to guide people to the next step or call to action. Simple reminders about where to go to learn more, take action or get involved—especially when those reminders are valuable and personal—will help you maintain engagement with the community and move people up the ladder to become volunteers, supporters and even donors. For example, when supporters of the Team Up For Autism campaign tweeted the link to the infographic, staff could reply to the tweet with a direct message of “Thanks for participating!” Or, when participants in the Big Blue Test shared photos on Instagram with the campaign hashtag, staff could “like” the photos on users' accounts, showing appreciation directly on their profile.

- **Established relationships with community influencers before launching the campaign.** The organizers specifically targeted people with family members who have autism and others in the community who work to raise awareness about the disorder. They sent emails, tweets and Facebook messages to explain how these leaders could be part of the campaign and encourage others to participate. This

way, when they launched the campaign, a number of influential individuals were ready to share the infographic with the public and spread the campaign messages.

- **Invested in staff training beforehand to ensure that those running the campaign knew more than the general use of social media tools.** The staff learned about best practices and achieved a hands-on understanding of how to

engage supporters and create conversations online.

- **Followed up with participants to thank them and keep them informed.** The planners understood that social media serves as a connection point not just during campaigns and major calls to action, but in between as well. They sent individual, personalized Facebook messages and tweets with updates about the campaign and also used the

“Like” option on Facebook as well as the Twitter hashtag to send posts of gratitude.

“Big Blue Test” helps improve diabetes health and raise funds

The Diabetes Hands Foundation, with a mission of changing behavior and supporting those with diabetes, launched its fourth annual Big Blue Test campaign in October 2012 on the website BigBlueTest.org to encourage people with diabetes to test their blood sugar, exercise for 14 to 20 minutes and test again—all in an effort to provide life-saving supplies to humanitarian diabetes charities around the world. For each participant who went to the website and took the Big Blue Test, Roche Diabetes Care, maker of Accu-Chek diabetes products and services, pledged \$5. Each time a person returned and posted information about his or her exercise, Roche donated an additional \$5, up to a total of \$100,000.

The goal was reached before the November 14 deadline. It’s a true multichannel campaign because participants could move from the website to social media to email and back again. To take part in the Big Blue Test, a participant did not have to use all the available channels, but regardless of where someone came across the campaign online, it was clear how to get involved.

Filling out the Big Blue Test form online took less than a minute, and at the completion, participants were encouraged to share their experiences by clicking on Twitter to post a tweet (using the hashtag #bigbluetest) or clicking on Facebook to recommend the Big Blue Test to others. They also could put the hashtag on photos they posted on the photo-sharing application Instagram.

The campaign helped thousands of people experience how easy it is to exercise enough to lower their blood sugar, and it solidified their understanding by reporting their activity publicly to friends and family online. Participants were given the option of providing their email address when they signed up so they could receive updates, allowing the program to continue sending information to prime participants for future campaigns.

When creating a campaign like this, in which people share messages, encourage others to participate and are asked to change their own behavior (in this case, by exercising and testing blood glucose), it’s critical to:

URL and branding as the campaign. The microsite’s simple design made it easy to read and to use from other devices, such as tablets and smartphones.

- **Make the social sharing component a step in the process.** The online Big Blue Test form directed people to share their test results on Twitter or Instagram and to recommend the program on Facebook—providing icons to click on so little effort was involved. Remember that people are more inclined to share information by social media when they can see others sharing first. The Big Blue Test microsite pulls in all the images participants post online publicly with the

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Social media connects all your channels—including print, broadcast, online and live events—and helps your organization’s story reach more people than it would through traditional media alone.



- **Carefully consider the pathways you will use to promote participants’ engagement.**

How can you make participating as easy, fun and beneficial for people as possible? The program used a dedicated web location that allowed people to log their tests and let organizers count progress toward the number of participants needed to earn the full pledge. Instead of adding another page to the Diabetes Hands Foundation website and trying to direct traffic there, organizers set up a simple microsite with the same name,

campaign hashtag. Visitors on the site see a scrolling photo album of participants exercising and taking the test. The photos and sharing help to reinforce participation and positive behaviors among people with diabetes.

- **Aggregate content from social platforms on your site.** Results from the campaign were posted on BigBlueTest.org so followers could track progress and read others’ stories. It’s an easy way to keep people informed and provide fresh content without having to create it yourself.

City of Hope spreads compelling stories across channels

City of Hope, a cancer treatment and research center near Los Angeles, uses social media in creative ways to share information and stories that boost fundraising efforts and draw attention to research. One of only 41 National Cancer Institute-designated Comprehensive Cancer Centers nationwide and a founding member of the National Comprehensive Cancer Network, a nonprofit alliance of the world's 21 leading cancer centers, City of Hope is full of information from patients, family members, donors and staff about surviving and thriving, which it spreads using a highly effective multichannel approach.

In its "Faces of Hope" series, stories are prominently featured on the City of Hope website to profile researchers, physicians,

survivors and supporters. The series features compelling short videos and print narratives, and you can watch the videos on YouTube, and "Like," share or see related content on Twitter, Facebook, Flickr and other platforms. For example, you can learn about Gavin, a little boy who received a life-saving bone marrow transplant from a woman on the other side of the world—and regardless of where you first come across the story, you can easily

follow it and share it with others.

As you get involved in the saga of his leukemia diagnosis at age seven months and the people who helped him recover, it's simple to "Like" the story on Facebook, Tweet about it or pass it on to friends and family. You even can click on links to become a volunteer or a bone marrow donor. Although it's not unusual for hospitals to share touching stories about their efforts, City of Hope manages to associate concepts of

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In the fundraising and philanthropy arena, social media is highly effective for **calling attention to your cause and fleshing out your story** in ways you can't achieve through a direct mail letter or public service announcement.



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City of Hope used another effective hook in its “Mushrooms for Hope” partnership with the Mushroom Council, a group that promotes fresh mushrooms to consumers. But this time, instead of poignant stories, the main attraction was recipes, eye-catching photos of food and content about the healthful attributes of mushrooms. In support of Shiuan Chen, Ph.D., director of the City of Hope’s Division of Tumor Cell Biology, who is leading studies about mushrooms’ cancer-fighting properties for breast and prostate cancer, the Mushroom Council worked with City of Hope to help people learn about the benefits of mushrooms and other superfoods for cancer prevention from medical and nutrition experts. The lively content generated broad


interest, showing that providing information valuable to supporters’ lives is one of the best ways to increase your fans and followers and keep them engaged.

Here are more City of Hope social media strategies:

- In the “Mushrooms for Hope” campaign, people were invited to pin recipes with photos of mushrooms on a Pinterest board; then users could repin them on their own boards and share them with their networks.
- The “Mushrooms for Hope” organizers put quick posts on Twitter using common hashtags like #superfoods and #cancer to move content into topic areas where people may not already know their organization—thus spreading the word and making it easy for others to share the content.
- In the “Faces of Hope” series, City of Hope uses social media to

tie its communication channels together and make it easy for people to share and follow stories wherever they first see them.

If you watch Gavin’s video on YouTube, for example, you can also click on links that provide more information and post comments about the story.

As these three examples demonstrate, multichannel campaign strategies can return high engagement from your community and help you achieve your organization’s goals. 



Amy Sample Ward, an author and speaker, helps nonprofits around the world use technology for community impact efforts. She is the coauthor of *Social Change Anytime Everywhere*,

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Gift planning **without** GPS

Successfully navigating donor visits requires flexibility and adaptability to unforeseen circumstances



The rain was pouring down as I drove to an evening appointment with prospective donors from Honolulu. It was dark and I could barely see the street signs through the film of water on my windshield. Fortunately I had my GPS, which guided me to my destination turn by turn.

On a later visit to rural Mongolia, where there are almost no paved roads, my navigation experience was very different. Vehicle tracks in the hardened mud run parallel to each other, and sometimes abruptly veer off to the right or left. No signs direct you or warn you about washouts and boulders—the trip is a moment-by-moment judgment call with constant course corrections. Thankfully, our experienced driver Gana had an excellent sense of direction and usually chose the smoothest of the tracks. But occasionally his old Russian-made van plunged into a pothole, causing us to bang our heads against its padded ceiling.

In our gift planning interactions, is it helpful to rely on a GPS-like system, a plan that directs us turn by turn, as I did in Honolulu? Or might we benefit more by knowing the general direction we should be heading and continually adjusting our “route,” as our driver Gana did? To effectively steer our way through the journey with a prospective donor, we need a combination of both methods. Most calls will involve advance planning and proven strategies, but we also must be able to readjust our approaches as new information is disclosed.

Gift planning would be simpler if a GPS device could be implanted in your ear, telling you the best thing to do or say in every situation. But it also would take much of the enjoyment out of creating genuine connections with our contacts by being willing to listen and adapt.

Following the known path

I’ve found that in interactions with potential donors about planned giving, it can be easy to rely on methods that have become proven strategies for us. These may include the policies of our institution, the fund-raising principles we have learned and the information we have gathered about the prospect. Similarly, explanations of the various gift instruments and how they can accomplish family and philanthropic objectives often follow a

familiar pattern, and standard computer-generated illustrations for contributions of cash or marketable securities are sufficient for many meetings. These tools and methods become well-worn “tracks,” and if they work you will tend to follow them.

Some visits involve more scripting than others do. For example, a call on a qualified prospect to secure a current capital campaign gift usually entails a discreet “ask” for a specific amount. The solicitation team will have rehearsed and decided in advance the roles each will play—who will make the case, how they will transition to the solicitation, who will ask for the

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People give to an institution not because it has needs, but because those needs concern them. **The best way to tap into those concerns** is to put away your script and discover what is important to your donors.

gift and how they will respond to possible objections—and they will very likely take a written proposal with them.

Frequently used proposals, methods and advance scripting are part of a gift planner’s GPS. If they help us connect with potential donors, it would be foolhardy to ignore them. But even if these tools have worked in the past, we must be nimble and ready to adapt. The road can always take an unexpected turn.

Watch out for potholes

No matter how thoroughly you have planned ahead, you can always encounter an obstacle on your journey with a donor. One such visit involved a woman whose gift seemed assured. As the director of planned giving at a university, I had met

with her many times and written a small book about her father's role in founding United Parcel Service (a condition for the \$25 million bequest she had included in her will). She even had been to campus for the dedication of a room in his honor.

On this visit, the dean of the school of business and I planned to ask her to accelerate \$5 million of her testamentary gift to name a wing of our new business building. But when we arrived, she met us in her doorway, yelling in anger. When she calmed down enough to tell us what was wrong, we learned that she had just read in a right-wing newsletter that a professor, whom she considered to be quite leftist, had spoken on our campus. She informed us in no uncertain terms that she was canceling her entire bequest.

Our planned strategy was based on solid information and assumptions. This donor could easily afford a \$5 million gift, which would further honor her father, and our interactions with her had been very positive. Although our GPS had programmed us for exactly how to make our case, now it appeared that we would lose everything. We were shocked. After lots of hand holding of the donor over the next few months, we did manage to salvage \$5 million of the testamentary gift, but we had to abandon any thought of a current gift.

This situation illustrates the importance of being flexible and adapting to unforeseen circumstances. If we had continued to push for an immediate gift, we likely would not have received any bequest at all. And another major factor in our success with this donor was the personal relationship we had cultivated with her over time. People give to people as well as to causes, and making the effort to

understand this woman's concerns and what she valued built trust and resulted in her eventually being willing to work with us.

Discover donors' interests

It's rare to take a detailed proposal with you on your first call with a prospective donor. Unless the person is interested in a specific

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We may close more and larger gifts if we consider creative combinations.

gift instrument and has given you information in advance, the objective of the initial visit is to listen.

According to a professor at the University of Washington School of Medicine, the average time a patient speaks before being interrupted by a physician is less than a minute. "Wouldn't it be wonderful if a physician listened to you as a patient, just sat and made eye contact, and then with care and thoughtfulness examined you?" the professor asked. "That isn't just diagnostic; it's therapeutic."

Her observation applies to gift planning as well. Before we prescribe a remedy—in this case, a bequest, gift annuity, charitable remainder trust or whatever—it's vital that we understand what is going on in our prospect's life, personally as well as financially, and learn about his or her passions. Asking open-ended questions, paying attention to body language as well as to words, not feeling a compulsion to fill all of the silences and avoiding driving home your scripted points regardless of what the person is saying all contribute to an atmosphere in which your prospect feels truly heard.

Sometimes we may be sidetracked by preconceived

notions about a donor's interests. During one visit, our solicitation team, which had done some pre-visit investigating, assumed that a prominent physician would want his capital campaign gift to be directed to his university's school of medicine. We gave him a proposal for an endowed professorship, which he received politely but without enthusiasm. But he became animated when a team member happened to mention seeing him at a musical event. Our representative shifted gears, asking if he had ever considered a professorship in the school of music, and he was eager to discuss the idea. We might have avoided this misunderstanding if the team had first listened and asked for more information. One simple yet effective question is, "If it became possible for you to help fund any program or project that interested you, what would you most like to support?"

Another time, the CEO of a social services organization that was conducting a capital campaign remarked to me, "We need just three particular people in this community to make our campaign a success." When I asked if any of these three had made a gift to the organization, she said that they had not, so I



followed up with, "Have any of them made contributions to organizations with a similar mission?" To her knowledge, they had not. "Then why do you think they would make a campaign gift to you?" I asked. "Because they have money and we need it," she replied.

Too often fundraisers approach their task like this CEO: Ms. Donor has money, how do we extract it? The approach is ineffective because people give to an institution not because it has needs, but because those needs concern them. The best way to tap into those concerns is to put away your script and discover what is important to your donors.

Planned gifts often are generated while you are reviewing and preparing illustrations and gift agreements with donors and their professional advisors. During these meetings, you might say, "You have been a faithful contributor to our hospital, and I am wondering if you would consider endowing your gift." Or you could ask the donor what he or she considers to be the institution's greatest challenges, and then follow up with, "Would you be willing to help us address those challenges with a gift through your estate?"

The perils of technology

Some gift planners like to take an iPad or other technological device with them on calls to show the prospect an impressive graphic presentation. This can be useful; for instance, a person considering a charitable lead trust may inquire about the charitable deduction based on different payout rates and trust terms, and it's advantageous to be able to provide the information instantly. But sometimes you can become so focused on your excellent presentation that you fail to pay attention to the words and body language of the person sitting in front of you. An article on the front page of the *New York Times* bore this headline: "We have met the enemy, and he is PowerPoint." Nowhere is that more true than in the personal visit.

Using tools like PowerPoint when developing gift plans also can stifle creativity. It is easy to fall into a rut, relying on the typical pairings of donor situations and gift instruments that may result from using standard presentations. But we may close more and larger gifts if we consider creative combinations.

I once worked with a couple who owned a home and sailboat on one of the islands in Puget Sound, as well as a large block of appreciated stock with a very low cost basis that paid minimal dividends. They wanted to move from the island, simplify life and increase cash flow, and do all of this as soon as possible. No typical charitable instrument would accomplish all of their objectives, so we tossed aside the PowerPoint and developed a plan using a combination of a charitable remainder trust, a gift annuity and a bargain sale.

Positioning for the future

The ultimate gift planning without benefit of GPS involves positioning our institutions as the world and our profession change over time. If we could correctly predict economic challenges and tax reforms, we would be better able to allocate resources and create effective marketing plans. But since we don't have a map for the future, we must notice trends in gift planning and figure out how to adapt to them.

Recently, life income gifts—particularly charitable remainder



The advertisement banner for MD Designs features a dark blue background with a blurred image of a modern building. The MD Designs logo, consisting of a stylized 'MD' monogram, is positioned on the left. To its right, the text 'MD DESIGNS' is displayed in large, white, sans-serif capital letters, with the tagline 'RECOGNITION FOR A LIFETIME BY METAL DECOR' in smaller white capital letters below it. A horizontal line separates the header from a row of five categories: 'DONOR WALLS', 'HALLS OF FAME', 'AWARDS', 'SIGNAGE', and 'DISPLAYS'. Each category is accompanied by a small, square image showing examples of the work. Below this row, the phrase 'RECOGNITION DONE RIGHT' is written in large, white, sans-serif capital letters. Underneath, a white text box contains the message: 'When it comes to acknowledging those who matter most in health care philanthropy, it's critical to get the job **done right**.' At the bottom, a dark blue bar contains the text 'To discover how MD Designs can meet your recognition needs visit us at www.mddesigns.com' followed by social media icons for Facebook, Twitter, Google+, and LinkedIn.

trusts and pooled income funds—have declined because of reduced tax incentives, among other reasons. Gift annuities remain more popular, but they too are not increasing as they once did. With fewer of these more complex gifts, many planned giving programs have morphed into what are essentially bequest programs. For many institutions, this means a decline in their range of services and perhaps in overall donations.

Another shift has been the merging of planned and major gifts. Until recent years, stand-alone planned giving departments at health care and other institutions were staffed by skilled technicians who focused on life income gifts and bequests. However, today there are fewer specialists and a blurring of the distinction between planned and major gift officers. Increasingly, the technical aspects of gift planning are outsourced to consultants, and internal staff focus on donor relations.


In many institutions, the annual giving model is being adapted to market planned gifts. Often an organization will hire a vendor to develop a call list and use the vendor's trained telemarketers, who

then contact prospects to ask if they would consider an estate gift. These calls uncover existing bequests that can be stewarded and also identify new prospects to be cultivated—thus outsourcing an aspect of marketing that used to be part of the planned giving department's responsibilities.

Finally, there is the question of how the digital age will shape planned giving. Although we are still marketing planned gifts to a generation accustomed to receiving information through print media, their children and grandchildren are increasingly reliant on electronic communications. Just as many university classes are now offered online instead of in a classroom, in the future more prospects will likely be identified through electronic means, including social networking. Inevitably, planned giving will become more high-tech. But it will always be high-touch.

Although we can observe these trends in our profession, we aren't always sure how best to respond to them. For that, like our Mongolian driver Gana, we must rely on experience and judgment, dare to switch tracks and sometimes even create new ones.

In Mongolia, our destination is a ger camp, a cluster of round, portable structures created by wrapping pressed wool and waterproof covering over a modular wood frame. We sleep in the smaller gers, and in the larger dining ger we gather to reminisce about the wonderful friendly herders we met during the day, eat mutton and yak and sample fermented mare's milk. After a day of having your insides rearranged by jolting roads, constantly wondering if you are going in the right direction, it's great to celebrate. Sure, it would be easier to be on paved streets with clear signs and GPS guiding us, but it wouldn't be nearly as much fun.

You may feel similarly satisfied at the end of a successful encounter with a donor. May your journey of gift planning, with all its twists and turns, continue to be full of fun and surprises. 



Frank Minton is a former chair of both the American Council on Gift Annuities and the Partnership for Philanthropic Planning. He now advises American and Canadian charities on gift planning through his company, Frank Minton Consulting, LLC.



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Institutional sustainability

Transitioning from “hunter-gatherer” mode to a cultivation-based strategy for long-term fundraising success

The rise and fall of ancient civilizations is a subject that has fascinated me since childhood, and after 30 years of working in fundraising, nonprofit management and charitable giving, I can’t help but notice parallels to the rise and fall of nonprofit organizations. To survive and thrive in the nonprofit world, organizations must transition from a “hunter-gatherer” funding strategy to one that systematically cultivates donors—becoming “farmers” who create long-term sustainability.

Cultivation is key

When I was growing up in St. Louis, Mo., I loved going to Cahokia Mounds State Historic Site across the Mississippi River in Collinsville, Ill., to explore traces of the once-thriving community that lived there from 700 to 1400 A.D. At its peak, around 1050 to 1200 A.D., the city of Cahokia covered nearly six square miles, had upwards of 20,000 inhabitants and featured sophisticated developments—including palisaded villages, communal plazas, monumental public structures, symbols and decorations—and a complex hierarchical society. What happened to the prehistoric Cahokians is unknown; by 1400 A.D., the site had been abandoned. In its heyday, however, the site was home to one of the greatest civilizations in North America.

According to anthropologists, prehistoric tribal groups that grew into advanced civilizations, such as the Cahokia, were generally those able to transition from a hunter-gatherer subsistence strategy to an agricultural-based system. The people of Cahokia were the first Native Americans to learn how to cultivate maize. Hunter-gatherer groups generally remained small and moved frequently, following the food source. Because foraging was everyone's primary occupation, the people in those groups were less likely to develop a complex social structure with full-time specialized skills, such as those found in the Cahokians. Instead, hunter-gatherer groups stayed small, primitive and isolated.

If groups did not eventually become farmers and ranchers, they usually failed to survive. Game became harder to find and hunting

grounds were taken over by land cultivators. Some tribes died out, while others were absorbed into larger groups or became victims of hostile takeovers.

Focus on farming

In keeping with my metaphor, nonprofit organizations start out small and simple—in modern parlance, lean and mean—without in-house accountants, human resources directors or information technology specialists. They operate as hunter-gatherers,

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Some organizations try to keep fundraising expense percentages as low as possible...and in doing so, lock themselves into a hunter-gatherer approach.

searching for donations to sustain them for the next days or months. These types of organizations are never short on stress. If someone doesn't go out, "hunt down a donation" and bring it home, the group does not survive—instead either dying out or being absorbed into a larger nonprofit. Those that survive remain relatively localized and obscure. Small, hunter-gatherer nonprofits modify or truncate their mission and values over time, based on the mission and values of potential funders; that is, they follow the

food source. This is true even with some faith-based organizations, whose values you would think would be immutable.

In contrast, successful nonprofits develop a predictable subsistence strategy. They learn how to cultivate donors and create large, sustainable organizations that become major forces for good in the world.

Gradual transition

Nonprofits that start out as hunter-gatherers do not become cultivators overnight. Skills, knowledge and complex systems associated with cultivators take time to evolve, and the organization must continue to focus on pressing needs—such as finding donations. It's a gradual transition and not automatic. One of the greatest hindrances to developing the art and science of cultivation is short-term success in hunting and gathering. Because learning how to cultivate as a sustainable resource strategy is so labor intensive, hunters don't become farmers until they are forced into it.

Nonprofit organizations, even large ones, do not focus on cultivating a broad and renewing donor base if they have been able to get by with large public sector grants, funds from a small group of major donors or business-related income. This is particularly true at hospitals, although they are finding that health insurance and public-sector funding are becoming less predictable—similar to the food supply for hunter-gatherers. Both hospitals and universities have historically relied on income from patients and students, but universities have worked longer and harder to cultivate donor relationships. Today, hospitals are trying to quickly transition from relying

on customers who are compelled to visit and pay to achieving a sustainable donor base.

One of our clients, a Midwestern hospital, discovered that generating \$2 million more in annual net income would require investing \$100 million to expand the hospital facilities and services. It didn't take long for the math to hit them: invest \$100 million to increase net income by a mere \$2 million. In contrast, the same hospital realized it could invest 35 cents in expanded fundraising efforts for each dollar increase in net income—an approach that would be approximately 150 times more cost-effective than expanding the hospital.

Tips for becoming a “farmer-rancher”

Based on my experience in charitable estate planning and my success raising hundreds of millions of dollars for health care institutions, I offer a few suggestions and action items to help with the transition.

1. Develop a long-term strategic vision. Answering the question of how to become a sustainable organization is just as important to major donors as it is to grant-makers and investors. Major donors think like investors; they will not waste money on a project that is destined to fail because it cannot be

sustained. But some leaders cannot resist the temptation to expand their organization, and as a result, they perpetuate such pressing needs that they never have the flexibility to develop a cultivation-based system. Other leaders have the idea that they can raise more money when the organization is in crisis, so creating crisis is their development strategy. However, in creating crisis, they also create the conditions that all but guarantee the organization's eventual demise.

A lot of nice people will make small, one-time donations to your cause. But they will not become committed investors unless

Stuck in the **hunter-gatherer** approach

As a consultant to more than 100 hospital foundations, I've learned many lessons about how to do things right—and how to fail. I've also picked up insights from the recruiting arm of my firm, Thompson & Associates. Here's evidence I've gleaned to suggest that many nonprofits are stuck in the hunter-gatherer mode.

- The majority of job openings for development directors are at

organizations in financial crisis. Instead of looking for cultivators of long-term strategies, they seek big-game hunters who can show immediate results.

- Most development directors are fired because of lack of short-term results. And when development directors resign, it's often because they see the shortfall coming before the chief executive and board do.
- The primary reason donors stop giving is because they feel like the organization loves their money more than it appreciates them. When my organization surveyed 25 major donors about their giving experiences, their biggest complaint about giving and nonprofits was that they “felt hunted.”
- The average amount of time a fundraiser stays in his or her job is 16 months, according to a study of more than 1,700 fundraisers and 8,000 nonprofit chief executives

by Cygnus Applied Research. Most development directors who have been at an organization for a long time have been able to succeed because both they and the organization take a cultivation or farming approach to fund development.

- Grant-makers find that the greatest and most consistent weakness in the thousands of grant applications they receive is the lack of a credible sustainability strategy. Executives at grant-making foundations are keenly aware of the importance of long-term, predictable sustainability. They know that organizations must learn to cultivate donors and cannot rely solely on hunting for donations. Whenever an applicant comes in seeking a big donation to fund a big proposal, grant administrators always request their sustainability plan—essentially asking, “When are you going to learn how to farm?”



they believe in the cause, in the potential for growth and in the long-term sustainability of the organization. Major donors need to see that you have a long-term strategic vision in order to feel confident that the organization will thrive. Typically, this vision is outlined in the sustainability plan you provide on formal grant requests. Unfortunately, many of these plans lack a clear, workable approach for achieving the results you want. The answer to the sustainability question is not simply to raise more money or

expand the donor base. You need a plan and a funded strategy to do that.

Action Item: Create an advisory group made up of business professionals and individual donors to evaluate your funding campaigns and sustainability strategy—people who represent segments of your donor base and will be brutally straightforward with you. This can be an ad-hoc group or an ongoing committee, but it should include more than board members and staff, who may be so emotionally

invested in the organization that they are predisposed to approve of a long-term strategy or a specific appeal even if it lacks strength. And because they are so familiar with the organization, they may fail to notice that information important to new donors is not provided in the plan. Independent eyes looking at a strategy from a donor perspective is like a spoonful of reality.

2. Promote a cultivation mentality. Leaders of successful nonprofits think like farmers; it's all



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about sowing and reaping. If they want to expand the organizational program, they first look at expanding their development program—planting more seed and cultivating more relationships.

And thinking like farmers means they do not have an entitlement mentality, a pitfall at some nonprofits. I've come across organizations in which the leaders seem to think that donors, foundations and government agencies "owe them" support. An entitlement mentality at nonprofits tends to be associated with a relatively small number of funding sources. Some donors have told me that, in the back of their minds, they wonder, how would the organization they've been so generous to feel about them if they decided not to give? And those concerns are not unfounded. In my experience, the reason organizational leaders with entitlement mentalities react angrily to reduced funding is because they believe something is being withheld that "belongs to them."

Action Item: Establish a discipline of planting, harvesting and adding new fields. Each time you expand your program you should simultaneously expand your fields; that is, expand your funding sources. Do not put a burden on the same donors to give more money.

Then, measure and monitor the expansion of your donor base as precisely as you do the expansion of your program, so you can create realistic projections. Donors want to see growth and broadened impact in the programs they support, but they are wary of expansion plans that rely on the same group of people for funding.

3. Invest in donors.

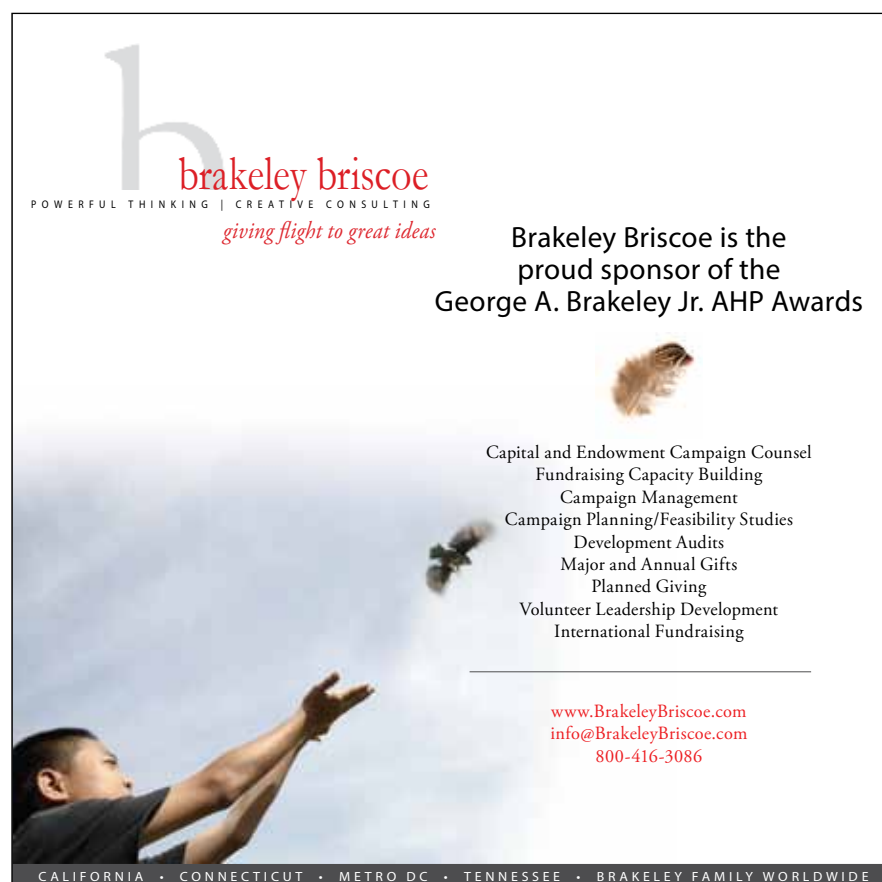
Organizations that transition

effectively from hunter-gatherers to cultivators understand the value of planting and cultivating—as well as how the cost of these activities pays off. They know that investing proactively to expand donor relations will produce a financial return. In contrast, some organizations try to keep fundraising expense percentages as low as possible, hoping to demonstrate to donors the efficiency of their gifts. They seek to contain the amount of fundraising expense reported on their Internal Revenue Service Form 990, and in doing so, lock themselves into a hunter-gatherer approach.

The irony is that professional grant makers and donor-investors look for more development and donor-relations investments, not less. Obviously, they want to see

organizations using money wisely, but they are not as impressed by low fundraising percentages as many nonprofit executives think. If your fundraising expense is too low, it means you are not investing in broadening your donor base.

Action Item: Every nonprofit organization's budget should specify an amount to spend on donor relations as well as a percentage toward acquiring new donors. Fundraising expense often is the first thing that gets cut when funds are tight. As difficult as it may be at times to reduce programs or administration expenses, if you cut back on fundraising efforts, it's like eating the seeds you should be sowing to cultivate future returns. Transitioning to a cultivation-based approach requires discipline and, sometimes, hard choices.



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To survive and thrive in the nonprofit world, organizations must transition from a “hunter-gatherer” funding strategy to one that systematically cultivates donors—becoming “farmers” who create long-term sustainability.

One of our clients had 11,000 donors who had each given more than \$5,000. The organization employed only one major gift officer, who had the capacity to manage and personally contact about 175 donors. Our client was thinking, “Wow, look what we have been able to do with only one major gift officer!” Our analysis: “Wow, there are 10,825 donors who have given over \$5,000, and you are not cultivating them. Think of how much money you are leaving on the table!”

The board took our advice, made a significant investment in the fundraising budget and hired additional staff. Total revenue quickly surpassed the additional

fundraising investments, and the fundraising expense percentage actually went down.


4. Ensure leaders are committed to farming. If your entire leadership isn’t on board and working together with the same agenda, thoughts of creating a long-term, cultivation-based funding strategy can easily be displaced by immediate and pressing organizational needs. Creating a system in which you continually recruit, retain and expand the involvement of donors takes time and consistency. Whether your organization is a one-person operation or a hospital with thousands of employees, that

commitment to cultivating donors begins at the highest level.

Action Item: The action here is less defined because it depends on your role. If you are the board chairman or the chief executive officer, you have much more power to shape the organizational culture and fundraising philosophy. Whatever your role, the best way to initiate internal change is by serving and supporting, teaching and learning and—when given the opportunity—leading the way to champion the long-term approach.

Stop and evaluate

In some cases, a vineyard may be a better metaphor for cultivating donors than a cornfield. It takes about five years of careful pruning, irrigating and fertilizing before the vines begin to yield fruit. Nonprofit leaders have to build in enough margin to enable gradual, steady donor cultivation.

In the real world, few organizations are completely oriented to hunting or to cultivating. It is almost always a mixture. However, with the day-to-day pressures of running a nonprofit, it is not unusual for our lives to get busy and our vision blurry. Consequently, we lose track of our priorities and our emphasis. We should periodically stop and evaluate our plans for creating a sustainable future for the organization. 



Eddie Thompson, Ed.D., is founder and chief executive officer of Thompson & Associates, a firm specializing in charitable estate planning. He also consults with nonprofit organizations, foundations and charities to help them develop their planned giving policies. He launched his career at David Lipscomb University as vice president of institutional advancement, assistant to the president and director of planned giving.

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