

How the
development officer

+ executive director **All**
Together
Now! + board members
= successful fundraising for your organization

BY MARY ELLEN COLLINS

Although seasoned development officers may be credited for raising impressive sums of money, they know that the most effective fundraising takes place when an organization's leader, board members and development staff form a team that shares the hands-on responsibility and the rewards.

The ways in which organizations create these teams, however, depend on timing, the age and needs of the organization, as well as the personalities of the people involved. The strategies may vary, but successful teams have one thing in common: All of the members realize that fundraising responsibility extends beyond the walls of the development office.

Establish Ownership and Accountability

Development professionals agree that having leaders who are willing to fundraise is half the battle of creating a cohesive fundraising team. Even if the executive director and trustees have raised money on a small scale or have done it in a way that does not quite meet the needs of the organization, being open to learning, growing and changing sets the stage for success.

When Sterrin Bird, director of institutional advancement for Sacred Heart Schools in Atherton, Calif. (www.shschools.org), arrived in April 2009, the leadership was conducting a \$95 million campaign. The head of school and the trustees were actively engaged in fundraising, but they had not considered ways to strategically grow the donor base. "In the past, they had survived on the generosity of a few people and didn't need a robust development program,"



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Bird says. “They were going to known top donors, to the inner circle, and doing a major-gift campaign.”

However, the board members were very open to new ways to professionalize the fundraising. “The head of the school and the board of trustees made a strategic decision that they needed to take the development program to the next level to secure funds for the current campaign and to grow the annual fund and plan an endowment campaign for the future,” she says. “The school has aspirations to position itself with schools like Andover and Exeter. They have very formal development programs, and we need that in order to sustain the level of excellence we aspire to.”

In her first eight months, Bird created a structure around the existing campaign. “Now we have a 36-month plan with a specific gift table and benchmarks and a goal of touching the entire community and inviting their participation in this effort.”

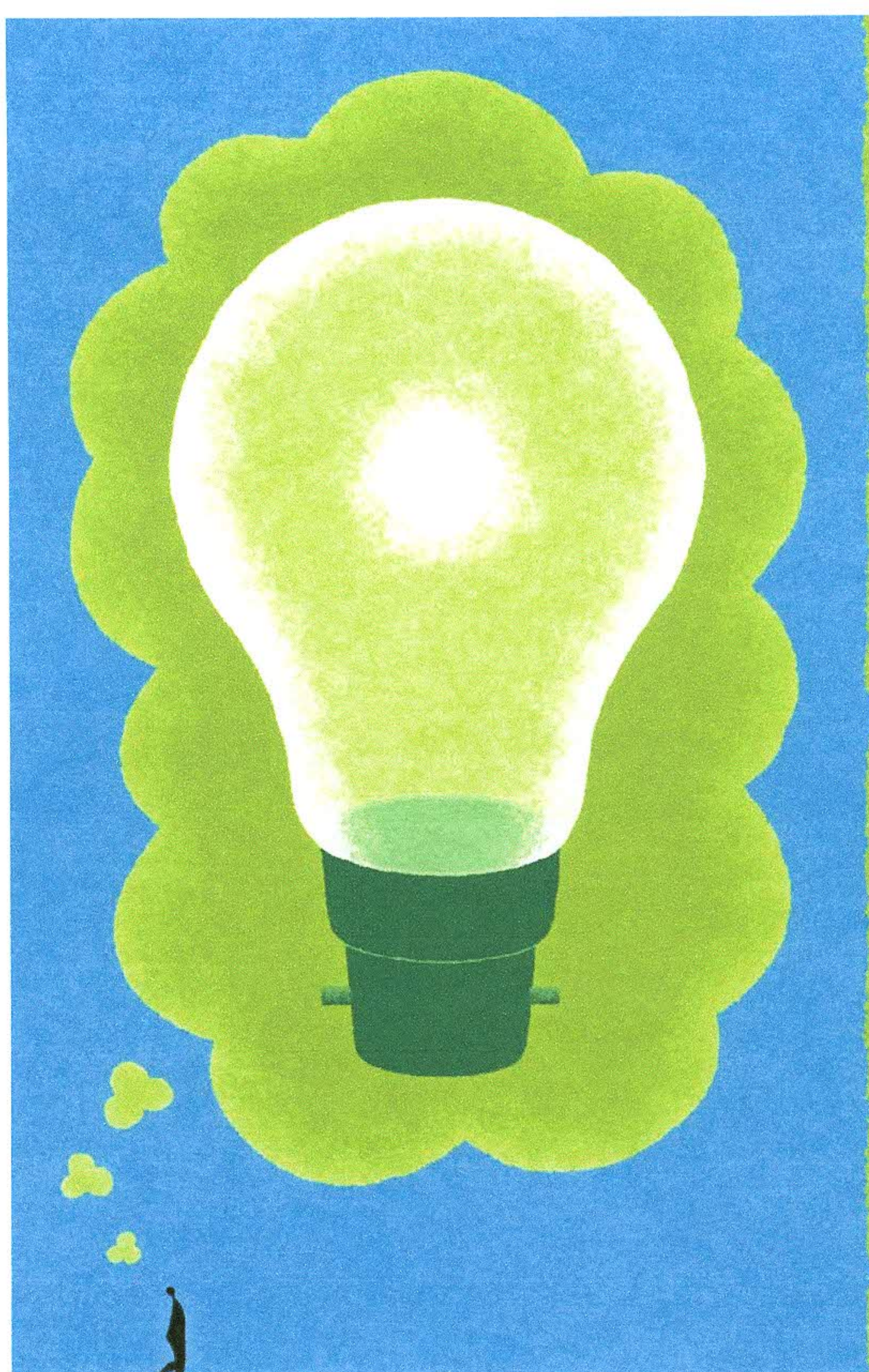
Bird conducted training sessions for the board on fundraising fundamentals. In order to extend the outreach beyond the inner circle, she created a briefing team and a solicitation team within the campaign cabinet. “People think, ‘Oh, everyone knows about the campaign,’ but they don’t,” she explains. “The trustees and parents who don’t want to solicit do walking tours and cultivation events and get the people ready to be solicited. A former board chair said, ‘I will do anything but ask people for money. Please give me a job.’ She has briefed 40 families and is growing the donor base exponentially with every meeting she has.”

The CEO and the board members have adopted a more hands-on role in expanding all of their fundraising. Bird says “no surprises” is the best way to build ownership among the leaders of the organization. “That’s why benchmarks and timelines work. If you wonder why you haven’t raised any money this week, it’s because no visits were made. And I publish that. You have to put it out there. It’s not a secret. It’s a best practice.”

The school has raised more than \$65 million toward the \$95 million goal and is already looking ahead to the next campaign, which could be as much as \$100 million for endowment. Bird underscores the need for fundraising conversations to include the development professionals in order to make sure everyone understands the fundraising reality behind their dreams.

“The development officer needs to be at the table when fundraising projects and goals are discussed so you can explain what is entailed in raising the money they want to raise. It’s not good business to make a decision without all the information. I have a place at the table in the finance committee meetings and explain what that will cost and what size gifts we’ll need. I say, ‘In five years, I will be coming to you for gifts of half a million or more, and if you’re gasping, we have more talking to do.’”

There is definitely no gasping in surprise—only for joy—when an organization’s leaders take their responsibilities personally.



Make It Personal

At the Kossuth Regional Health Center (www.krhc.com) in Algona, Iowa, fundraising was limited to an end-of-the-year appeal and an annual Legacy Ball that raised funds for the endowment. Although the small rural hospital did not have a history of organized contact with donors, it was planning the largest campaign in the foundation’s history, a \$1.5 million effort to support a much-needed renovation. When Nancy Grandgenett-Besch arrived almost three years ago to serve as executive director of the Kossuth Regional Health Center Foundation, she found organizational leaders who understood that their campaign plans would require an increase in participation and effort.

“I was lucky. The board was very open,” Grandgenett-Besch says. “The project was so exciting and the board members really wanted to be involved. They came into it with the mind-set that, if we all share the fundraising load, it won’t be overwhelming.”

Although this level of fundraising was new to the hospital, it helped that fundraising was not new to the community. Several board members had been actively involved in the local YMCA’s recent campaign. Furthermore, the hospital is the only one in Kossuth County, the largest county in Iowa



and home to all of the foundation board members. The fact that the need for renovation resonated personally helped to engage the board as well as the staff.

“The project was so desperately needed,” Grandgenett-Besch explains. “We had done a campaign video that was a huge help in recruiting volunteers. In this day and age of energy conservation, we showed 60-year-old windows that were rotting because they had wood frames. We showed how small the rooms were, the lack of privacy and how hard it was to move a patient’s bed into a room when there was another patient there.”

People who spent their workdays at the hospital joined the board members in becoming willing participants on the fundraising team. “We did an employee drive before the campaign committee was in place,” she adds, “and were able to go to the board of trustees and the foundation board and say, ‘We have 100 percent staff participation.’ One doctor and two nurses chaired the staff effort, which raised \$200,000 from a staff of 205. I never had to talk anybody into it!”

With the help of fundraising counsel, Grandgenett-Besch launched into campaign-training mode. She formed a major-gift committee to work with donors of \$15,000 and up, and

a second committee to work with the remaining donors. She also set up meetings and trainings to review prospect lists, make assignments and walk people through the solicitation process.

Surprisingly, the board members turned down Grandgenett-Besch’s offer to accompany them on visits, which she attributes to the fact that she works part-time and they did not want to pull her away from her responsibilities while she was in the office or expect her to spend her off-hours making visits. “Everyone felt comfortable going without me, so I let them set up their appointments,” she says. “Some people went out and had their appointments set up two days after we met. For others, the co-chair of their committee and I would constantly email and check on how their appointments were going.”

Engaging a board in fundraising often requires teaching them the development nuts and bolts, reminding them of what their board membership involves and sometimes nudging them to do more than the minimum required. “It’s a matter of educating them,” Grandgenett-Besch explains. “When I bring in new foundation board members, we do an introductory meeting and go through a binder that highlights their responsibilities.”

Not only did the hospital’s fundraising team reach the \$1.5 million goal, but in January 2009, they publicly launched a \$250,000 minicampaign to renovate the dialysis center. They are already halfway to the goal, which Grandgenett-Besch attributes to the success of the first campaign and getting the word out that the hospital is committed to delivering quality care in 21st-century facilities.

Indeed, when the executive director and board members are personally committed to goals, it is much easier for them to become the biggest cheerleaders for your organization’s mission.

Communicate, Motivate and Inspire

In some organizations, the fundraising team evolves from the leadership of an executive director who wears the chief development officer hat. And fundraising professionals know they are a few steps ahead of the game when they can partner with experienced and development-savvy leaders who put fundraising at the top of their job descriptions.

John Sanchez, executive director of East Side House Settlement (www.eastsidehouse.org) in the Bronx, N.Y., for 20 years, describes himself as the bandleader or gatekeeper of a development team he calls “a hydra-headed system” that includes the board, staff and a consultant. His hard-working board members have handled special-event fundraising for more than 50 years. They actually founded and “own” the prestigious Winter Antiques Show, from which they net all of the proceeds, totaling about \$1 million a year.

Sanchez relies on a consultant from J. C. Geever Inc. (www.jcgeever.com) in New York City to handle foundation and corporate fundraising. Also, after he and the board determined that the organization’s work on personal sollicita-

tion efforts could use strengthening, he hired a major-gifts officer about two years ago.

“The challenge for anyone with a set-up like this is to find a way to communicate clearly and frequently,” says Elizabeth Wagner, vice president at J. C. Geever, who has been the organization’s foundation and corporation consultant for about seven years. “There’s a seamless and integrated communications pattern—all of us communicate frequently by email. I sometimes get in touch with John 10 times a day and sometimes just a couple of times a week.”

Sanchez’s communication with board members includes a clear expectation that each will raise a minimum of \$5,000, inclusive of personal gifts of \$3,000 each year. If they need an occasional nudge about stepping up to the plate and meeting their obligations, Sanchez falls back on his training as a social worker.

“The key is not to have a didactic conversation and not to make people feel like they’re failing,” he explains. “You create a venue where people can get together and remind themselves why they’re involved with the organization. Ask

what the challenges to the organization are. Is there more we should be doing? If so, what resources will it take?”

It was this kind of conversation during an initial strategic planning process that led to the creation of the board’s give-get policy. “When we recruit board members, we have that conversation,” Sanchez adds. “We say what the expectation is, and the expectation begins on day one.”

Also, publicly recognizing board members who meet those expectations provides effective motivation. “Helping board members make that first connection is key,” Wagner says. “You recognize who are the ‘getters’ and give them credit and thanks at board meetings. It’s important to let them feel that they’re an important part of things, and it spurs everyone else on, too.”

Development officers agree that a visionary leader is a prime ingredient in a successful fundraising team, and Sanchez exemplifies the type of executive director who has the ability to keep the gears of the fundraising machine running smoothly while keeping all members of the team focused on why they do what they do. “John has a particular skill

Who’s Fundraising Now?

BY LINDA LYSAKOWSKI, ACFRE, AND MICHAEL SAND, ESQ.

In your organization, who is responsible for fundraising? The development officer, the executive director or the board? The answer should be all three! However, the dynamics of working together as a fundraising team are often challenging, to say the least. Board members might not see fundraising as one of their roles. Volunteers may be hard to come by in a recession. Staff may have been cut to the bone, forcing development officers to spend all their time putting out fires rather than identifying, cultivating and soliciting major gifts. So how does an organization build its staff, board and volunteer team into a well-oiled machine and provide the tools they need, sufficient time and enough human resources to seek and land major gifts?

1 Use effective board recruitment. Often, board members are reluctant to raise funds because they have not been recruited with that purpose in mind. For many organizations, fundraising has never been a part of their culture, for various reasons. Perhaps in the past they relied on government funding, fees for service or foundation grants. Then when the needs of the community increase dramatically, or when existing funding sources shift priorities and income streams dry up, the organization must rethink fundraising and is stymied by how to introduce this concept to the board.

Even if the organization originally intended its board members to be involved in fundraising, sometimes board recruiters are reluctant to use the “f word” for

fear of scaring off potential board members. Many well-intentioned boards operate under the noble idea that, “once individuals join our board and see the great work we are doing, they will want to go out and ask for money.” Wrong! If board members have not been told up-front that fundraising is a part of their role, they will not embrace it later when you decide to “slip it into” their responsibilities. It is important to develop a board position description that includes a required financial contribution from each board member, as well as the expectation that each board member be involved in the organization’s fundraising efforts through attending events, planning development activities and helping to identify, cultivate and solicit potential donors.

2 Encourage prospect cultivation and the joy of giving. How often have you heard, “We can’t get our board members to help with fundraising. They aren’t the ‘movers and shakers’ in town.” Despite this common view, time after time organizations have been amazed to uncover some unbelievable connections on the part of board members who thought they “didn’t know anyone with money.”

The thing to remember is that all board members have a sphere of influence that can be used to help their organization. They just need to be made aware of the value of their connections and how they can use them.

Board members and other volunteers need to experience the joy of giving themselves. The key thing all “askers”—board, staff or volunteers—must do is make their own gift first. It is a proven fact that those who have made a contribution will always be more successful at asking others to give, because they can ask them to “join me in investing in a great project.” Of course, the board members and volunteers also need to be convinced that what they are asking for is a worthy project. The organization must have a compelling case for support and an effective development plan, and this is where staff comes in!

set that makes him very good in this quarterbacking role,” Wagner explains. “He has terrific relationship-building skills and he’s built a superb staff team. He’s very focused on the long-term picture of the people that East Side House serves and is very good at boiling ideas down to their core and saying, ‘Who’s going to be served and what impact will this have on their lives long-term?’ The way he thinks about the work lets you feel close to the people and the outcomes. His work reflects his core values, and he’s very good at sharing that with others.”

Not all development officers have a CEO or executive director like John Sanchez. Sometimes they find themselves in a transitional situation with a new, unknown leader coming on board. While some may find this unsettling, new opportunities often arise.

Capitalize on Transitions

Shabina Bahl, director of development at the James Buchanan Brady Urological Institute, Johns Hopkins Medicine in Baltimore (www.urology.jhu.edu), knows firsthand that changes

in leadership offer a perfect opportunity to build on successes and create an even stronger fundraising team.

The previous chairman, Dr. Patrick C. Walsh, had been a very active fundraiser, and the board chair had focused on helping out in his professional areas of expertise, which were branding and marketing. Board members, many of whom had longstanding relationships with the chair, had a history of giving generously, but they were not actively involved in soliciting gifts.

When Alan W. Partin, M.D., Ph.D., took over as chairman and director, he followed in the footsteps of his predecessor. “I expected extensive involvement in fundraising. Through the years I worked very closely with the previous chair and knew the ropes before I took over.”

Partin does weekly lunches or tours with prospects and donors and makes quarterly fundraising trips. “He’s very comfortable talking about the projects that are in his particular areas of research,” Bahl says. “In some cases, he might bring a junior scientist along to a meeting with a donor. And he does ask for the gift!”

3 Allow for sufficient staff. The organization must allocate sufficient funding to the development office. Furthermore, development staff must utilize good strategic planning techniques to develop a fundraising plan. Building consensus, a vital part of strategic planning, is also critical in the development planning process. Involving key stakeholders in the development program—board members, volunteers, management staff, program staff, donors and the entire development staff—is critical.

CEOs and development officers are often under a great deal of pressure to raise money quickly. Entrepreneurial board members who are shrewd business people often are accustomed to working on the basis of instant decisions. They may want the development office to just “go out and do it” without adequate planning. Development officers may be so caught up in keeping their heads above water that they do not have the time to plan. Organizational leadership must take the time to plan strategically; otherwise, their organization will be left behind in the dynamic and ever-evolving world of the nonprofit sector.

4 Support CEOs and board members. One way to convince leadership of the importance of strategic plan-

ning for development is by having them interact with the key nonprofit leaders in their communities. A CEO or board chair from a highly respected and successful nonprofit can often convince a struggling CEO of the value of strategic planning for development.

Leaders want their opinions to matter, but may feel that development is not their area of expertise. They may want to spend their time on organizational planning, with which they are generally more comfortable. Development officers need to help their organization’s leadership reach a comfort level with development and philanthropy and convince them that their insights as the organization’s leaders are critical to the development program.

5 Involve volunteers. Involving community leaders in the philanthropic process and development planning is one good way to ensure that community concerns and changing environments are incorporated into the nonprofit’s development program.

Marketing people, key business leaders and individuals with political expertise are generally in tune with factors in the community that could affect the organization’s development program and should be

invited to participate in the philanthropic planning process.

Volunteer involvement in the development process is critical, but volunteers need to know that the organization is efficiently using their time, has a strong program that is worthy of support and will provide all the tools volunteers need to be successful.

6 Promote team spirit and motivation. Always be encouraging, especially if this is a first effort for the board. Remember, not all fundraising requests are going to be successful. Encourage all individuals involved in fundraising to continue by stressing that they are building relationships and not just raising money. After all, the three keys to successful fundraising are relationships, relationships, relationships. ☺

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She credits him for not only playing a hands-on role in cultivating and soliciting major prospects, but also with choosing a new board chair, Chris Evensen, who is focused on all aspects of the development process as the department prepares for an upcoming \$90 million campaign.

“Chris is very comfortable with fundraising,” Bahl says. “He’s the board chair of his kids’ private school and understands the process. He’s focused on every aspect of what we do—research, patient care, teaching—and he’s really helping us think through the strategy of translating our research priorities and looking at them from the donor’s point of view. Chris has personal knowledge of how good the doctors are here, and he’s a great advocate at letting people know how transformational our work is. I did have to train him on the cultural nuances of Hopkins and issues related to grateful-patient fundraising. For example, you have to be sensitive to issues, such as if someone’s PSA [prostate specific antigen] just went up, it’s not the right time to ask for a gift.”

Bahl considers herself fortunate to have both a department chair and board chair who work with development staff to get the remaining board members more involved in the work of raising money for the department.

“Chris and Dr. Partin have worked very closely with the director of research and me to engage the board with a specific set of activities. Board members are not just asked for their financial help, but also for their ideas, input and feedback. It’s important to find your senior champions, and hopefully, that’s your director and one or two board members who share the same thoughts. If the development officer is the only one trying to make changes, it won’t work.”

From Partin’s perspective, the board will rise to new challenges if it sees positive movement toward big-picture goals. “Provide constant vision, ask questions, listen to the answers and, above all, get things done. Board members like to see progress and vision.”

Seeing progress and setting the bar even higher also motivate leaders to do even more.

Sounds Like a Plan!

When Rich Berlin became the executive director of Harlem RBI (www.harlemrbi.org) in 1997, the organization was about \$50,000 in debt and on the verge of going out of business. Thirteen years later, the New York-based organization, which provides inner-city youth with opportunities to play, learn and grow, now raises about \$6 million annually, with 85 to 90 percent coming from private sources of support.

Berlin started out as the solo fundraiser for the organization, focusing on raising money from individuals who believed in the concept of using baseball as the hook to engage inner-city youth. He also quickly focused on building a board that would, among other things, expand his fundraising team. “First and foremost we made it explicit to board members

that fundraising would be part of their role, not only to make personal significant gifts, but also to solicit others with our support or to open their address book to us.” By 1999, he was able to hire his first director of development.

“We were transitioning to a place where we would be eligible for institutional money. Our programs were robust enough to seek those kinds of funds and we had the infrastructure to pursue them.”

Today, Berlin manages a six-person development office that includes Maleka Covington, director of development. “Maleka and I share the hat of chief development officer,” he says. “She operates the day-to-day development functions, and she and I and the board think together about development strategy. I really do think if the executive director is not in some way or another the chief development officer, you have a little bit of a problem.”

Harlem RBI’s board is definitely not the place for people who like to be board members in name only. Berlin uses a “board report card” to track activities ranging from giving and getting to attending events and participating on committees; and the board chair reviews each person’s report card with them annually. People who do not deliver on their promises and play an active role in moving the organization forward do not stay on the board.

“Initially, there was some nervousness around the willingness to be evaluated and held accountable,” Berlin says. “But now it’s become so much a part of the culture that people who get a gift will joke and say, ‘That’s going on my report card, right?’ Something strong has emerged out of something potentially uncomfortable.”

Covington provides an example of the board’s responsiveness when the economy took a turn for the worse. “In September 2008, it was early in our fiscal year but getting close to program season. We quickly went to the board and said, ‘We don’t want to turn kids away from our programs, and we don’t want to lose any staff. Funders will want to know how we’re going to weather the storm.’ We started sending that message individually and in groups, and the board members increased their giving nearly 100 percent over the previous year.”

Berlin says that he, the staff and the board stay motivated and on track by adhering to an annual 50- to 60-page development plan. “The plan is a 365-day to-do list. That’s what we’re driving toward, and when you’re successful, that keeps people motivated. We’ve developed a culture of accountability.

“When it comes to fundraising, it’s everybody’s job and everybody is accountable. It’s always been part of the mix of what we do, and we’ve gotten better at it over time.”

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ENO Excuses!

How your organization's leaders can avoid fundraising stage fright and learn to actually like working with donors

BY PAUL LAGASSE

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sk executive directors and nonprofit board members what they like most about fundraising, and undoubtedly many, if not most, will offer a quick and rather similar answer: Nothing. What's a development officer to do?

It is common for board members not to realize that they might be expected to solicit or give. Too few nonprofits make that requirement explicit in the job description or during the recruiting process. Or board members might try to avoid the responsibility, explaining that they are too shy or that they are worried about doing a poor job. Likewise, executive directors might prefer to leave fundraising strategy and execution to the development director. Yet, if the board and executive director have no personal engagement in fundraising, the consequences for the organization could be dire.

The importance of the board's role in fundraising was underscored in the 2003 report by McKinsey & Company *The Dynamic Board: Lessons from High-Performing Nonprofits*. The report emphasized that boards are responsible for "ensuring that the level of resources that can be developed is consistent with the vision and strategic plan the board approved and helping raise the necessary funds by working effectively with the nonprofit's development staff." This ability, according to the report's findings, is one of the three major responsibilities of any successful board.

Experienced board development consultants explain that enforcing the classic imperative of “Give, Get or Get Off”—or the more recent “Gather, Get Ready and Grow”—can turn a board around. However, one of the most common frustrations that fundraising consultants hear from development directors is, “How can I get my executive director and board members to see the light?”

Seizing Opportunities

Before you can convince your board and executive director of the importance of being actively involved in fundraising, they first have to recognize the dangers of not being engaged, says Sandra P. Drew, senior consultant and co-leader of the Schools Practice Group at Marts & Lundy Inc. (www.martsandlundy.com) in Sonoma, Calif. Typically, she explains, such awareness is triggered by a change in the institution’s status quo. “It could be a new executive director or development director coming in, or maybe it’s a board member asking questions about the financial reports. It takes a catalyst that creates enough momentum to get people to ask, ‘Is our development program performing as well as it should be?’”

The economic downturn has been an obvious catalyst for dramatic change at nonprofits attempting to adjust their goals to fit declining revenue, evaporating grants, a shrinking corpus and rising layoffs. Organizations need to assess how their fundraising programs will work within this “new normal.” “If there is a silver lining in this dramatic change in the economy,” Drew says, “it’s that these questions are being asked. This in turn leads to the generation of new ideas and relationships.”

In addition, fundraising should be treated as both a core governance issue and a matter of individual responsibility, advises Patricia L. Stirling, a partner at San Francisco-based Cardaronella Stirling Associates (www.cardstirling.com). “Board membership alone represents a significant level of commitment, but getting board members involved in the fundraising process requires a deepening of that commitment. It leads to a more focused commitment to fundraising and the overall organization.”

Engaging board members in the fundraising plan from the beginning will encourage them to develop a sense of ownership and a desire to provide the necessary resources. It’s a logical fit, Stirling says. “Fundraising is an outgrowth of everything that the board is doing and wants to accomplish. Over and over again, I see nonprofits fall down by not making that link explicit.”

Stirling cites the contrasting experiences of two clients. One was an institution undertaking its first campaign to mark its 50th anniversary helping a local underserved community. Although the board, president and development officer all lacked fundraising experience, they mounted a successful five-year campaign that met its multimillion dollar goal. However, within a year of the campaign’s conclusion the president left, the staff experienced dramatic turnover and the institutional memory of the campaign’s success was

lost. When the organization launched another campaign several years later, it had to start from scratch. “It was a missed opportunity,” Stirling says. “There was an infusion of cash, but no transformative experience resulting in a long-term commitment of the board in the development function.”

The other organization likewise had never launched a fundraising campaign and had a similarly inexperienced board, executive director and development director. However, the chair of the campaign, herself a former development professional, was highly enthusiastic and made a sizable leadership gift to start off the campaign. The board responded wholeheartedly, first becoming active fundraisers themselves and then formally linking their fundraising and governance roles. The campaign exceeded its goal, but instead of letting the momentum and institutional memory dissipate, the board immediately began to prepare a strategic plan and recruit motivated board members. As a result, the organization is today well-placed to continue raising money.

“Most people are uncomfortable asking for money,” Stirling explains. “The way to change that dynamic is to integrate fundraising so that it’s seen as central to the mission, the life, and the health of the organization.”

Growing a Culture of Philanthropy

The process of answering these questions enables board members and executive directors to better understand why fundraising is essential to success and to become directly engaged in it themselves. At Marts & Lundy, an atmosphere that is conducive to attracting philanthropic support over the long term is considered a “culture of philanthropy.” Veteran philanthropy consultant Charles Sizemore, a former senior consultant and board member at Marts & Lundy, identifies the common characteristics of such a culture:

- A governing board that demonstrates responsibility for and leadership of annual and capital giving programs
- A president who understands his/her role in the development effort and uses every opportunity to inform internal and external constituencies of the importance of all levels of philanthropy to the institution
- An openness and frankness in describing the institution’s dependence on philanthropy, as manifested in its governing board meetings, publications, alumni gatherings and visits
- A development staff that is proactive in explaining the institution’s funding priorities to external constituencies
- A board, executive director, and staff that recognize the integral nature of fundraising in generating revenue for the institution and, thus, are willing to support the activities of the development staff
- Advancement staff who are acknowledged as important contributors to the life of the institution and are accorded appropriate respect
- At educational institutions, students who appreciate the education and life experience they are receiving and who are encouraged to give back to the institution
- An institution that is genuinely proud of its fundraising

Leadership Fundraising

Marilyn Bancel, CFRE, principal of The Oram Group Inc. in San Francisco (www.oramgroup.com), says that in the 30-plus years she has been active in Bay Area nonprofits, she has seen a steady increase in the number of board volunteers who attend workshops, classes and AFP chapter meetings with a desire to develop cultures of philanthropy at their organizations. At the same time, she continues to meet development directors who express frustration at their unmotivated boards and executive directors. “The development director is often in a position of giving advice to people who don’t want to take it,” she says. “It takes effort to make a board that means business.”

Bancel empathizes with board members who express hesitation about fundraising because she remembers what it was like when she launched a community arts newspaper about 30 years ago. “I had a cold shock when I discovered that I was going to have to raise money for it,” she recalls with a laugh. “I was terrified. I was innocent.” She likens the feeling to stage fright and reminds people of the words of stage and screen veteran (and noted philanthropist) Helen Hayes. “Of course I get butterflies before I go on stage,” Hayes once quipped. “But now I have them flying in formation.”

Flying in Formation

So what else can you do to help your board and executive director maneuver their fundraising butterflies into formation and guide them to their targets? “Many board members are afraid of asking for money because they’re afraid of screwing up or alienating the person or getting rejected,” says Suzanne Irwin-Wells, principal and founder of Irwin-Wells Associates in Mill Valley, Calif. (www.irwin-wells.com). “I tell them to think of fundraising as a revolving wheel with a hundred spokes, of which only one is actual solicitation.” The rest of the spokes are comparatively low-impact activities, such as:

- recommending prospective donors
- introducing prospects to solicitors
- arranging lunches with prospects
- going along on solicitations as a storyteller
- forwarding information of interest to prospects

“The idea that you’re going to have a board that’s 100 percent engaged in actual solicitation is just not realistic,” Irwin-Wells notes. However, everyone should be able to find something that they’re comfortable doing. To achieve 100 percent board and executive participation, she suggests developing and implementing a fundraising strategic plan that identifies the roles expected of board members and the executive director, to ensure that all spokes of the fundraising wheel are accounted for.

Jane Williams, principal at Schultz & Williams in Philadelphia (www.schultzwilliams.com), agrees. “Executive directors are responsible for the development program, but too often people think they have an oversight role. They have to create the agenda for fundraising. Executive directors who are comfortable with asking lend credibility to the organization and boost confidence.”



THE ANNUAL BOARD APPEAL

The annual board appeal should be the first fundraising activity of the fiscal year. Before asking anyone else to support the organization, the board needs to show its full commitment. The board appeal is conducted much the same as any other fundraising appeal.

- Recruit a solicitation team from the board, usually the board chair and the development committee.
- The solicitation team evaluates each board member’s past giving and giving potential.
- Assign an ask amount and a solicitor to each board member.
- Using this initial evaluation, the team, together with the board, sets a board appeal goal.
- The board chair writes a letter to each director, stressing the goal of 100 percent giving.
- Finally, as with any major donor, the ask is made in person so that every board member understands the importance of this appeal.

Source: *Building an Effective Board of Directors* (AFP Ready Reference series) by Linda Lysakowski, ACFRE.

Equally important is cultivating prospects, Williams says. “Every board member should be asked to be part of prospect development. The idea is that board members should be proud to do this. It can’t be just another board for them.”

In addition, a standing development committee on the board will help ensure an informed process for enlisting and engaging board members and executive directors. “A structure helps people get engaged,” Williams adds. “The most important thing is to make your expectations clear.”

“The whole process should be done more carefully. Invite prospective board members to an event and chat with them about their interests, for example. Then have a sit-down meeting and go over the job description. Too often, board enlistments are done when executive directors call people they know and ask them to join the board. That doesn’t work anymore.”

A nominating committee can identify and court people whose talents suit established needs and fill known gaps, Irwin-Wells says. Provide clear written expectations and, if necessary, consider having recruits sign formal contracts. If you can bring two or three new people aboard at the same time, they will be able to learn from each other as well as from the organization.

Get board members to propose and hold themselves to a specific number of annual accomplishments, for example, serving on three committees or soliciting five major-gift donors. Regular self-evaluations should be conducted, either in private interviews or at board meetings. Use praise, not guilt, to recognize accomplishments and contributions. A stewardship committee can provide members who are having trouble with needed training and guidance. However, those who consistently cannot meet their obligations will need to be eased out—for the good of the organization and particularly for the morale of the rest of the board. Serving on a board must be understood as a privilege, as well as a lot of work.

In addition, the experts believe strongly that all board members also should be expected to make regular gifts to the organization, and that this expectation should be made clear to prospects early in the recruitment process. “While fundraising may be optional, giving is not,” Irwin-Wells emphasizes. “It sends the wrong message about the organization if its own board won’t give. You should be able to show potential donors that 100 percent of the board gives, which will impress them. A culture of philanthropy begins with the executive director and the board and works its way through the whole organization.”

At the same time, remember to show your appreciation.

Promoting a Culture of Appreciation

Bancel argues that a necessary precondition for a thriving culture of philanthropy is what she calls a “culture of appreciation.” “You’ve heard the phrase ‘Charity begins at home?’” she asks. “Many organizations don’t practice on their staff—or their board members—what they practice on their donors.”

Treating your board members with the same clear appreciation and acknowledgement that you would give your best donors can encourage them to both ask and give.

The executive director, board chair and development director set the tone for everyone else. Staff should make efforts to support the board in ways that are both big (making a gift to the organization) and small (greeting board members by name). Likewise, Bancel suggests inviting donors to attend board meetings to discuss why they support the organization. Also, presentations by board members from other organizations can help your board adopt effective fundraising techniques that it might not otherwise consider. These activities will help instill and reinforce a passion for the mission.

Keep the momentum up by placing fundraising front and center at board meetings. Put it early on the agenda, so that it is not sacrificed if a meeting runs long. Have a development officer review a successful gift request and explain the steps from scouting to asking to receiving the gift. Announce new gifts and congratulate the successful solicitor by email and in person at the next board meeting. The effects of these positive reinforcements will spread virally throughout your organization and sustain the culture of philanthropy. As Kay Sprinkel Grace wrote in *Beyond Fundraising: Strategies for*

Nonprofit Innovation and Investment (John Wiley & Sons, 2005), “Nothing lures like success. There is a strong correlation between a board management program that sets high standards and the depth of commitment that grows on a board. Motivated board members subvert mediocrity.”

Marts & Lundy’s Drew agrees. The goal, she says, is for the development director to help the board and executive director identify the organization’s strengths—and play to them. “It’s a better approach than throwing everything out and starting over,” she says. “You want to get people saying ‘I never actually thought of it that way.’ But if nobody’s asking, then the change will not occur.”

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Resources

The Dynamic Board: Lessons from High-Performing Nonprofits from McKinsey & Company www.inug.nu/content/download/354/1627/file/dynamic_boards.pdf

Big Gifts for Small Groups: A 1-hour Board Member’s Guide to Securing Gifts of \$500 to \$5,000 by Andy Robinson (Emerson & Church, 2004), paperback, 104 pages*

Boards That Love Fundraising: A How-to Guide for Your Board by Robert M. Zimmerman and Ann W. Lehman (Jossey-Bass, 2004), paperback, 128 pages*

Fired-Up Fundraising: Turn Board Passion Into Action (AFP/Wiley Fund Development Series) by Gail Perry (Wiley, 2007), hardcover, 240 pages*

The Fundraising Habits of Supremely Successful Boards: A 59-minute Guide to Ensuring Your Organization’s Future by Jerald Panas (Emerson & Church, 2006), paperback, 108 pages

Fundraising Mistakes that Bedevil All Boards (and Staff Too), Revised and expanded edition, by Kay Sprinkel Grace (Emerson & Church, 2009), paperback, 110 pages*

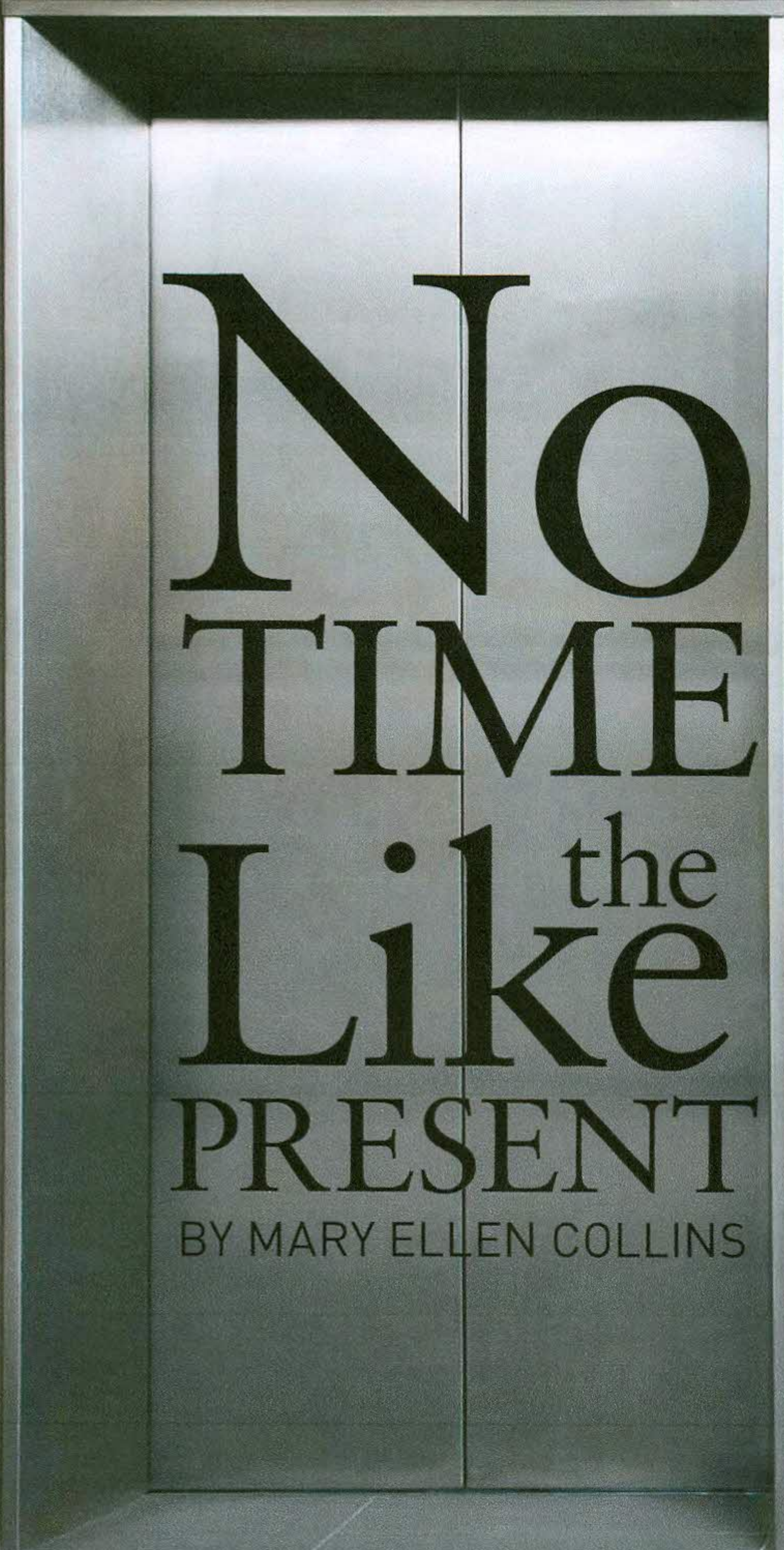
Secrets of Successful Boards by Carol Weisman (F. E. Robbins & Sons PR, 1998), paperback, 192 pages*

Team-Based Fundraising Step by Step: A Practical Guide to Improving Results Through Teamwork by Mim Carlson and Cheryl Clarke (Jossey-Bass, 2008), paperback, 144 pages*

The Truth About What Nonprofit Boards Want: The Nine Little Things That Matter Most by June J. Bradham (Wiley, 2009), hardcover, 141 pages

*Available in the AFP Bookstore, www.afpnet.org.

Even in today's economy, your campaign



**NO
TIME
Like^{the}
PRESENT**
BY MARY ELLEN COLLINS

can survive and thrive



How do you run a successful campaign in a recession? If you say, “With a lot of luck,” you are right, of course, but only up to a point. Good fundraising skills and using innovative options go a long way to ensure an effective campaign. In fact, the current economy may actually present opportunities that you had not considered before.

“The economy may be in a downturn, but it’s almost been an opportunity for us,” says Michelle Ahearne, executive director of the Sundt Memorial Foundation in La Jolla, Calif. (www.sundtmemorial.org and www.naturalhigh.org). The organization encourages kids to stay away from drugs and alcohol by discovering and pursuing a natural high. Their main program, the Natural High DVD series, is distributed to every middle school in the country free of charge.

“Our message and culture are very positive and strength-based,” she explains. “With the bad economic news we hear, our sense from speaking to donors and teachers we serve is that there’s a deep desire to connect with a message that is hopeful.”

Despite the economy, the foundation enjoyed record-breaking success at its annual fundraising gala in October 2008. “Even as another bank was literally failing every day before our gala, we netted \$187,000—a 10 percent increase from the previous year,” Ahearne says. “People were just on fire about our work. Donors were starting to call and say, ‘How can we get involved?’ and the same thing started happening with the educators we serve. With school budget cuts and more stress on teachers, they were calling and asking, ‘When’s the next video? We need more. Can you provide us with additional curriculum?’”

In an effort to harness the groundswell of interest, Ahearne and her small staff first tried the piecemeal approach to change by embarking on individual projects, such as creating a teacher network. However, they quickly realized that they needed a more strategic way to connect with the

donors and meet the needs of the educators. They laid the groundwork for the organization's first capital campaign, a three-year, \$1 million capacity-building effort that will support expanding human resources and programs. The silent phase of the fundraising will begin in early 2010, and based on this year's gala, Ahearne has reason to feel optimistic about the potential for success.

"With the economic outlook still bleak, we were unsure what to set for fall 2009 event goals, as many of our supporters were experiencing financial hardship," she explains. "A few could not participate at all, but many still did, even if it was at a smaller level. We also brought in a lot of new supporters and leveraged relationships with businesses. We intentionally used the gala to educate and inspire attendees and as a result we netted \$240,000, a nearly 30 percent increase from 2008."

Indeed, sustaining and increasing your organization's momentum is critical.

Maintain Momentum

The most significant common denominator in campaign success involves keeping the solicitation process moving forward, despite fears and assumptions about how the economy has affected prospects and donors, says Stanley Weinstein, ACFRE, president of Stanley Weinstein & Co. in Albuquerque, N.M. (www.stanleyweinstein.com).

"People are more afraid than they need to be," he says. "Some very wealthy people, whose objective is to preserve their wealth, lost almost nothing. Some wealthy people anticipated that they were at the top of a boom and felt they had enough and didn't need more. They didn't have their money in risky investments. Don't assume that everyone became poorer. Keep meeting with your top prospects, talk about your needs and the people you serve, acknowledge tough times and say you hope they'll make you a priority when they can. Do not stop asking!"

Kim Klein, principal, Klein and Roth Consulting in Oakland, Calif. (www.kleinandroth.com), offers a unique strategy for putting a solicitation into economic perspective, but emphasizes that it works only when the fundraiser already has a very strong relationship with the potential donor.

"People may not have as much as they did last year, but the market is back to what it was in 1997," she says. "So if you were wealthy in 1997, you're wealthy now."

Klein suggests framing that fact as a question and saying something like, "In my reading about the economy, it seems that people have as much money as they did in 1997. Do you find that to be true?"

She cites the example of one community center campaign, in which a donor responded to a solicitation by saying that she was not able to give anything and wished she had been asked several years earlier. The fundraiser continued to have conversations with the person, and at some point gently mentioned the 1997 wealth levels. The donor ended up giving \$150,000.

Klein reminds staff and volunteers who hesitate to ask for

gifts during a time when so many people have been negatively affected by the economy not to make the decision for the donor. "We so underestimate the deep need people have to give and to be participants. You can read any number of studies that show people who remain employed give more in tough times than they do in boom times. Your job is to invite people to give. Their job is to accept your invitation, decline it, take a rain check or suggest an alternative."

Such a positive outlook is essential. If you go into a situation expecting things to be difficult, they probably will be. Creative development professionals with a positive attitude find ways to take advantage of circumstances they most likely did not anticipate.

Capitalize on Innovative Opportunities

Fundraising consultant John Idstrom in Tacoma, Wash., a board member of The Grand Cinema, (www.grandcinema.com), says the organization realized an upside to the recession when it was considering a \$100,000 campaign to support a \$500,000 renovation project.

"During the time we were having several economy-related discussions about whether or not to do the campaign, construction costs came down 30 percent. The original construction bid

Keeping your
options open and
staying flexible
are critical in today's economy.

was \$500,000 and the later bid was \$350,000. We thought, if we wait two years for the economy to get better, construction costs will be back up and we'll be in the same boat."

The organization decided to go ahead with the campaign and has raised about \$20,000 in its silent-phase solicitations of board members.

The Tacoma Youth Marine Center (www.tymc.us) also benefited from the recession's effect on the construction business in its \$5 million campaign to rehab a building and reconfigure docks. "Subcontractors were offering a lot of in-kind support," Idstrom says. "For example, a pile driver contributed \$100,000 worth of pile-driving services and a concrete company gave \$25,000 worth of concrete to completely resurface the boatyard. We were able to take a piecemeal approach and have different subcontractors do different parts of the project instead of hiring one contractor who subcontracted the parts to people who had to be paid."

The organization has raised \$1.9 million, which Idstrom says is impressive, given the fact that it has no paid staff, no



history of capital fundraising and no history of maintaining relationships with graduates of its Sea Scouts program. “We will have to work hard for every dollar, but these volunteers are very, very committed,” he points out. “They’re not afraid to ask for money and they will not let this be a failure.”

Klein offers an example of a teen health outreach and counseling center that had been a tenant in a building for 30 years. Although the convenient storefront location and easy access to public transportation were pluses for the organization, it had outgrown the space, which needed extensive renovations and updating.

After considering new spaces that were out of its price range, the organization’s leaders approached the elderly owner, who was planning to sell the building, and suggested buying it. The owner had always liked the organization and agreed to sell the building for half as much as he could have gotten from someone else.

“They had already planned to do a capital campaign for some building, and now this one is the focus,” Klein says.

“The owner of the building gave them \$300,000 by charging half as much as he could have gotten from someone else. His ‘bargain sale’ had the leveraging power of a lead gift, and they would have had to get \$300,000 more for the campaign if he hadn’t done that.”

In the first few months of the silent phase, the organization has raised an additional \$200,000 toward its \$3 million goal. The campaign will support repairs and renovations and create a small endowment.

Indeed, keeping your options open and staying flexible are critical in today’s economy.

No Need to Rush

“Campaigns are taking more time, especially ones that have just started the silent phase,” says Jane Geever, chairman of J.C. Geever Inc. in New York City (www.jcgeever.com). She mentions one regional theater that just began a \$10 million renovation and endowment campaign in the spring of 2009.

“I gave them the option to not even do the feasibility study,

but they felt the need was genuine. We did the study in fall 2008, and in January 2009 the board voted to go forward with the campaign, even though things were down—and going down.”

Although Geever said this type of campaign should traditionally take two years, she advised a three-year campaign

timeline. After eight months, the organization had raised \$3 million, which included initial gifts from board members and a \$2 million, noncompetitive state government grant. As they continue their solicitations, they leave the door open for additional asks when the economy turns around.

Another of Geever's clients, a humane society, had plans

Strengthening Your Major-Donor Program

BY KATHERINE M. BELLA, CFRE, AND LAURA JASON, CFRE

As you begin to implement your New Year's plans, you need to consider last year's sobering economic realities. At the same time, you also must take into account that a majority of economists believe that the long road to recovery has begun and thus employ new strategies to realize your goals.

There are favorable statistics to note for development professionals seeking major gifts. Planned-gift, major-gift and direct-mail and solicitations had the highest levels of success in the current climate. Benchmarking data clearly indicate a positive relationship between the amount of time spent by fundraisers in communicating with potential donors and the more successful response rates when the "ask" was made: the highest performers in this regard outperformed their counterparts by as much as 86 percent. Carefully building relationships with prospective donors, demonstrating sensitivity to their circumstances, and offering flexibility to help them structure a gift were shown to produce the most positive results.

Given the new realities of today's economic climate, as well as the relative uncertainty about exactly when you can expect improvement and to what extent it will improve, consider the following positive steps to take now to strengthen your major-donor program.

1. Polish Up Your Organizational Image.

Most nonprofits see themselves as "the best kept secret in town." Given the economic climate, increasing an organization's public visibility has never been



more important. This is the time to assess your organization's image in the community. Invest in ways to raise awareness and position the organization as strongly as possible to help raise funds. For those organizations able to afford a public relations firm to aid in this process, progress can be made quickly and with significant results. Other organizations may have staff or board members who can provide their expertise in this process. Regardless of how much money you have available to spend and how much may depend on volunteer help, this is the time to focus on building the organizational image of your nonprofit in the community it serves. Donors and donor prospects need to know who you are, what you do and why their philanthropic investment will make a difference in helping you to fulfill your organizational image.

2. Invest in Prospect Research

Given today's challenges, prospect research is more important than ever.

Not only will it be crucial to carry out the usual level of research before soliciting a donor prospect, but it also will be even more important to get information about donors' giving in the last 18 months to see how the economy is—or is not—affecting their giving. When you rely primarily on anecdotal information in order to craft your strategy, you do your organization a disservice. Coupling anecdotal information with well-researched data is critical.

3. Strengthen Your Case for Support

The most effective cases for support have always been built on an organization's ability to present its history, successes and current needs in a way that compels a prospect to give. Now it is even more important that the message be well articulated, illustrating the organization's unique ability to carry out the program. Including concise financial information that demonstrates organiza-

for expanding its existing facility and building a second, new facility in another part of the community in order to accommodate significant increases in pet adoptions, admissions and surgeries. However, the organization's stakeholders advised a more temperate approach.

"The feedback from the community in the feasibility study

was, especially when there are economic challenges, let's go one step at a time," Geever says. So the humane society launched a three-year, \$4 million campaign to renovate the current facility. If that is successful, it will transition right into another campaign. Still in the initial fundraising stage, the organization has raised \$300,000 within the first several months.

tional sustainability must prove to donors that their philanthropic investment will show a strong return. Materials should be attractive and inviting, without appearing lavish.

4. Build Your Prospect Pool

This is a time to focus on current donors and to invest in acquisition. It is critical to provide the highest level of stewardship possible to keep current donors and cultivate those who you think have capacity to give in the future. Be creative in developing ways to bring the program to your donors and your donors to the program, so that they become partners in building organizational success. While it may take longer to get a gift, and the level may not be as high as it would have been two years ago, working hand-in-hand with donors will strengthen the long-term relationship with them and help sustain their support.

5. Finesse Your Ability to Make the Ask

Today's economy has greatly affected strategies around making the ask. Many donors have seen severe reductions in their assets. Others are much more tentative about their giving, not knowing when the economy will turn around. Others have been minimally affected by the economic downturn, having invested more conservatively. It is so important to be in close dialogue with your donors to understand their situation and how you can help them with their plans.

Asking will take more finesse, with solicitors needing to be well-practiced in negotiation. Volunteer and staff solicitors will need to be much more savvy about the financial implications of the project being considered. They will need to show quantitatively, as well as qualitatively, the difference that a donor's gift can make. Given donors' financial situations, one

might receive a gift at a much lower level than would have been true two years ago when times were better. Others may take much longer to decide on a gift amount and will require patience by the solicitor and organization. Donors also may choose to give in "rounds of funding," similar to how a venture capitalist would invest. Donors adhering to this philosophy may give a smaller gift to a capital campaign during the first solicitation, but be open to a second gift the following year once the campaign proves itself and/or the donor's financial situation has improved. Solicitors' ability to listen to donors' needs and concerns and offer options will heighten the organization's success while helping donors make the choice that is right for them.

6. Build Your Volunteer Leadership

Nonprofit organizations' need for effective fundraising volunteers is at an all-time high. Now is the time to recruit and train volunteer leaders who can aid your organization in fundraising. With high unemployment rates, look for potential candidates who are currently unemployed or have retired early. Volunteers' connection to major-donor prospects and their willingness to ask for a gift, or accompany a staff leader on a call, will make a significant contribution to the success of the major-donor program. It has always been important for solicitors to have made their own gifts to the campaign before soliciting others for support. That commitment is even more crucial now.

7. Create a Strong Internal Infrastructure

This is the time to strengthen the internal infrastructure of your organization to put it in a position of greater strength for fundraising success. The executive director or chief executive officer should

be trained and coached by development staff or counsel to optimize his or her ability to raise funds. The development staff should be adequately trained. Investment in their skill building, as well as team cohesiveness and effectiveness, is key to a successful development effort. This is also the time to work with staff as a whole toward thinking like a full development team. Each person in the organization must see how he or she fits in with the development goals and how his or her input and engagement can help the entire organization. Donor databases should also be assessed and upgraded, if necessary, to meet the demands of the program.

8. Revise Your Development Plan

As the new calendar year begins, regardless of when one's fiscal year starts, this is the time to create an optimistic plan for the future. Take some time to reflect on these various components of a development program and create a plan that is ambitious, yet realistic, for the year ahead. Think about both qualitative and quantitative goals for the year, as well as investments that will be important to make in 2010 in order to reap the rewards when the economy is stronger.

Your role, as development professionals, is to work in concert with the organizations you represent and the donors who have an interest in supporting the missions of these organizations. The work has never been more important, and with well-thought-out planning, you have the ability to fully optimize the potential of your donors, both now and in perpetuity.

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www.afpnet.org. It heightens the moral seriousness of what we do. We're meeting an immediate and serious need."

In fact, between July 1 and Oct. 1, 2009, 1,336 donors contributed \$247,146 to the fund.

Allen attributes the continuing campaign success to never losing sight of the university's goals. "The most important thing is that we didn't stop. We can and do acknowledge the economy. We approach each conversation with a great deal of respect for what the donor might be experiencing. But we've kept our needs in mind and stayed committed to playing the role we're asked to play in meeting those needs. In a challenging economy, it's even more important to get back to what it's all about and tighten your focus on how a donor's philanthropy will impact student learning."

In addition to maintaining focus, your organization also might have to aim even higher and take on a wider scope. The

they have identified the 2,000 pros to make a major gift to the campaign and plan to have a conversation with each one.

In an effort to be strategic in engaging the large percentage of Fortune 500 companies that are headquartered or have a significant presence in Cincinnati, a newly formed Corporate Committee comprising trustees and business leaders provides valuable counsel. "We make sure we recognize what challenges each company has and we work collaboratively to meet their needs," Mulvihill says. "We've delayed some asks and we've asked others for less."

The foundation team also developed a new way to communicate with faculty and staff about the campaign, doing everything online instead of instead of creating posters, letters and pledge forms. In addition, instead of going "top down," with the dean sending a letter to all faculty asking

be fulfilling our responsibility by doing anything less than generating the resources needed to continue transforming the University of Cincinnati.”

Accommodate Your Supporters

Having as much knowledge about donors and prospects as possible and listening to them are key elements of a successful campaign. For clients who have just begun the silent phase of their campaigns during the recession, Geever has counseled them to leave the door open if solicitations result in gifts that are lower than expected.

“Volunteers may be very concerned about going out and asking for gifts, but you have to do the solicitations. You want to be grateful for any size gift that anyone wants to make, but if the gift comes in lower, ask if you can come back later. That has been very well received. Donors say, ‘I would be happy to enter into another conversation.’ You have to help volunteers understand that the process is going to take longer and that they have to feel comfortable going back.”

The New York State Department of Health is financing a \$40 million project to create innovative group homes for a long-term care facility for senior citizens. Because the state also requires an organizational investment, the facility has embarked on a \$6 million campaign.


“In the feasibility study, people acknowledged that this is a bad economic time, but said the project is so creative, it’s so good for seniors and it’s going to be in our community that we have to do it,” Geever says. The organization raised \$750,000 in the first eight months of active solicitations, pursuing as broad a base of support as possible. Although foundations have expressed deep interest, the organization must be flexible in accepting the foundations’ economy-related approach to grant making.

“Some of the foundations are not making pledges,” Geever adds. “They’re saying, ‘Here’s what we’re giving to you right now. Our intent is to eventually give you X amount, but you have to keep coming back and asking.’ It’s the conservative nature of foundations. They’re rebuilding, and they don’t want to have the liability of the pledge. So, there’s moral intent but not the legal intent.”

Counting on promises instead of pledges is one of many recession-related frustrations that can sink morale—if you let it. However, the most successful campaign professionals rise above the economic doom and gloom to keep their volunteers and staff focused on the goal and optimistic about their chances of achieving it.

“This is not a crisis—it’s the new normal,” Geever emphasizes. “People have got to get used to riding the roller coaster as a fun thing. My mentor, Henry Rosso, said that when people asked him, ‘When’s the best time to raise money?’ he always answered, ‘When you need it.’ If you stay mission-driven, the economy can be a factor, but not an overwhelming obstacle.”

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“People have got to get used to riding the roller coaster as a fun thing.”

for donations, they recruited people in each college to ask their fellow employees to make a gift. After implementing the new approach, faculty and staff giving increased from \$9 million to \$10.3 million, and the number of donors went from 2,271 to 2,765.

The university had its best fundraising year in 2007–2008 and its second best year in the campaign (and fourth best overall) in 2008–2009. However, its success has not depended on a mysterious magic bullet. Hard work, relationship building and focus have kept everyone’s eyes on the prize.

“What’s going on in the economy has reinforced the importance of having as much knowledge about our prospects as we can,” Mulvihill says. “The most important tool we as fundraisers have is listening, and it’s important that we hear what their passions and their circumstances are and do it in a thoughtful way. For people who have the passion for the university, that passion hasn’t gone away. All of us—volunteers and staff—really believe in the role the university plays in enhancing the quality of life of our community. We’re on a path that everyone’s excited about and we would not