

Considering Philanthropy



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New Canaan, CT and San Mateo, CA. Offices in New York, Florida, Washington DC and California

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So You Want to Have A Campaign?

George A. Brakeley III

Sooner or later, every non-profit organization or institution considers conducting a capital campaign - or, often, a "comprehensive campaign" that includes non-capital needs and counts nearly every dollar given during the official pledging period. The opening question is, of course, why go through the bother, expense and effort to launch a campaign in the first place?

There are those who hold that the day of the campaign is fading, that constituencies are getting "campaigned out", that the volunteer base traditionally associated with campaigns is a disappearing species. Here at BBI, you can't prove it by us, if the number and quality of the inquiries we're receiving are any indication. It's clear to us that the better economic times we're now enjoying are creating a high level of confidence in the future among 501(c)(3) managers and governing boards.

The short answer to the "why" question is that campaigning is the most efficient way to

raise large sums of money in a definable period of time. If the organization is to remain competitive, have the capacity to take appropriate programmatic initiatives, and build on its strengths, it must be able to raise sufficient dollars quickly and efficiently, and the most effective way to do that is through a campaign.

But beyond that short answer are a number of operational and psychological considerations.

First, an institution must work constantly to focus public and constituency attention on its prevailing mission, vision for the future, and the objectives that must be met before the vision can be realized. Launching a campaign forces an institution to define or re-define itself - and then to set priorities. It compels the institution to articulate what it is doing, where it is headed, and what it wants to be.

Second, every institution needs a *raison d'être* for fundraising that is grand enough to inspire the imagination and to activate the

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Brakeley AHP Journal Awards

George A. Brakeley III, Brakeley Briscoe Chair and Managing Director, presented The 2005 George A. Brakeley, Jr. - AHP Journal Awards on October 21 during the Awards Breakfast at the Association of Hospital Professionals' Annual International Educational Conference in Vancouver, Canada. This was the 24th presentation; George A. Brakeley, Jr. established the awards in 1981.

The Brakeley-AHP Journal Awards recognize individuals who donate time and talent

to enhance the fundraising profession by writing outstanding articles for the AHP Journal. First- and second-place winners are selected by the AHP Journal Advisory Council and each receives a cash award and an engraved silver plate.

The 2005 first-place award went Gary J. Hubbell for "The Decades Ahead: Challenges and Adaptation Strategies." The second place winners were Karen E. Osborne and Robert C. Osborne, Jr. for "Stewardship and Accountability."

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Campaigns Require Discipline

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desire to give. Most donors like to be identified with big causes, and campaigns tend to be perceived as big because their goals are so ambitious. Defining the campaign case inevitably helps to clarify the essential worth of the entity, going beyond simply what it does to what its work is fundamentally all about and why that work is important.

Campaigns also help to coalesce resources, interests and efforts by leveraging a dynamic, high-intensity, results-oriented undertaking. The coalescing phenomenon helps to step up and maintain the pace and level of fundraising activity. A significant by-product is that sights for giving at all levels are raised and continue to be raised beyond the conclusion of the campaign, whether one is talking about annual giving or major gifts. All the boats rise with the tide, the saying goes.

Achieving the maximum benefit from a campaign requires the discipline of a well-structured operation with fixed assignments, goals and deadlines. Working within the defined parameters of a campaign can be exhilarating, creating an environment that builds morale, sense of purpose, and esprit de corps. Thus, campaigning generates a stronger sense of urgency and personal commitment in a development program.

Finally, campaigns provide volunteer leaders and donors with the assurance that any major participation will have high public recognition and lasting importance. This encourages the use of creative instruments, such as planned giving options, that allow donors to stretch to their fullest gift potential.

Variables to Consider

The general considerations outlined earlier apply to virtually to any institution or organization contemplating a campaign. But there are also a number of variables that are highly specific yet still vitally important. For example:

Internal Predisposition. If a campaign is to succeed, it must be "owned" by the entire institution, as opposed to being perceived as belonging to one segment or another or even to one person.

Especially at the Board level, there cannot be merely a significant predisposition toward a campaign; anything less than unanimity spells trouble.

External Predisposition. The issue here is whether the constituency - alumni, grateful patients, service recipients, business and foundation communities - is in a campaign frame of mind. If they are not (which can be assessed qualitatively and quantitatively), the campaign should be called into question, at least until appreciation of the need for the campaign is heightened through a program designed to create greater awareness.

Leadership. You can have an inspiring case, urgent needs, exquisite timing, and lucrative sources of support just waiting for you, but without dedicated and effective leadership, it just won't happen. The synergy of the leadership troika - volunteer chair, CEO and chief development officer - is more than crucial, it's the difference between a perfunctory effort and a great victory. (And it's why we at BBI, in our pre-campaign planning and feasibility studies, give such great weight to our assessment of the leadership team that is available.)

Institutional Morale. Campaigns have a wonderfully unifying effect. The football metaphor is perhaps useful:

BBI Developments

Alliances Expand Our Client Services

BBI is expanding its presence in the Midwest and building on our record of service to schools, colleges, health care institutions, zoos and women's organizations. With our new strategic alliances with Benefactors Counsel, LLC and RJS Associates, we are adding depth and geographic range to our client services.

Benefactors Counsel is headquartered in Columbus, Ohio. The firm is headed by Laura MacDonald and provides counsel in fundraising, philanthropy and voluntary leadership. Notable clients include the World YWCA, the Columbus Zoo and Aquarium and the Purnell School. Laura and her team are

currently collaborating with BBI in our campaign work at the Cincinnati Museum Center.

Winning requires a team effort, a strategy in which all believe, outstanding performance by a few superstars, a large and enthusiastic corps of boosters, and strong and consistent management. If your institution or organization needs to restore its credibility or has a less-than-spectacular fundraising track record, a campaign may be just the ticket to pull things together.

Carpe Diem. Made popular in the movie "Dead Poet's Society", the Latin phrase for "seize the day" is as true in fundraising as in any other human endeavor. On the one hand, one has only to open the daily mail to realize that the competition for the philanthropic dollar is unprecedentedly fierce. On the other, the 9/11, tsunami and Katrina tragedies are only the most dramatic examples of how conscious the ordinary citizen has become of the non-profit world and its funding needs. This dichotomy may provide the best argument for campaigning as a way of life. Darwin was right - the fittest do survive, but they do not survive without the vision, courage and determination to move forward.

When Not to Launch a Campaign

Let's lay one oft-heard reason to rest. Overall economic and philanthropic downturns, unless truly extreme, are decidedly not reasons to postpone a

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Robert J. Sylvester heads RJS; he has a long and distinguished career in education. He led three campaigns at University of Scranton, where he is now Vice President Emeritus. He served for 24 years as faculty and staff at Fairfield Preparatory School, CT. Bob brings expertise in serving religiously affiliated schools, colleges and universities. His collaborations with BBI include Providence College, Lehigh Valley Health Network, La Roche College and St. Joseph High School, Trumbull, CT.

Benefiting Carolina's Children; Caring for the Sentinels of the Sea; Curing and Preventing "More, Faster" at the CDC

Carolinas HealthCare (CHS), the 4th largest public hospital system in the US, founded in 1959, began considering a capital campaign in 2001. Although CHS Foundation had attracted as much as \$10 million annually, this would be the first campaign since its founding.



Brakeley Briscoe came aboard to help develop a campaign objective and strategy. The conclusion: CHS would build the region's first children's hospital--234 beds to complement the 861-bed flagship medical center.

The Marine Mammal Center, near San Francisco, rescues and treats ill and injured seals, sea lions, elephant seals and their kin; it operates research programs on their health and disease; and it educates children and adults about the importance of marine mammals as sentinels of the ocean environment. The Center has treated more marine mammals than any other institution of its kind in the world

But the hospital and triage centers were rapidly aging. The shipping containers, trailers and life support systems had to be replaced.

BBI prepared a plan and now counsels

Our planning study found strong support for the System's plans and community readiness to embrace the children's hospital concept. So the Foundation set a campaign goal of \$60 million to fund the \$85 million facility.

In mid-2004, the "Dare to Dream" campaign began with a \$10 million children's hospital naming gift from the Leon Levine Foundation of Charlotte.

With Howard C. "Smoky" Bissell as chair, the campaign has now reached 80% of goal and is preparing to begin the final public phase. The campaign has achieved 16 seven-figure gifts to date.

the campaign to rebuild the facilities. We helped The Center focus on finding and researching their best prospects, expanding cultivation, and strengthening the major gift program and volunteer participation in fundraising.



As the campaign totals steadily increased, so did the goal. Concrete and steel costs rose dramatically while the dot com bust reduced the resources of many prospects. The move into the campaign Community Phase coincides with the Center's 30th anniversary and the start of construction. Fourteen and a half million has been raised toward the \$18 million need.

The National Foundation for the Centers for Disease Control & Prevention in Atlanta,



serves CDC's vision of healthy people in a healthy world through prevention.

The Foundation connects outside partners and resources with CDC scientists to build programs that substantially enhance CDC's impact. Thus its slogan, "More, faster." Only ten years old, the CDC Foundation has raised in excess of \$100 million in corporate and foundation grants and gifts from individuals over its short history.

Brakeley Briscoe has served the Foundation for more than five years. Our work has included an internal management audit of the development program, ongoing counseling for the president and staff, and assistance in an executive search to find a chief development officer. In 2004, BBI conducted a pre-campaign planning and feasibility study for the proposed Visitor and Education Center on CDC's main campus to complement a \$1.5 billion expansion and renovation program. As we await the go-ahead on the new Center, BBI supports the Foundation's strategic planning and ongoing advancement programs.

Evaluate Campaign Risks and Potential First

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campaign. Nor are competitive campaigns. Your funding needs are not going to go away or become less urgent; your constituencies, by and large, are your constituencies through thick and thin; and if you wait for that ideal moment when all is clear, you'll wait forever.

Some factors, however, are worth considering, not the least of them being cost. Campaigns cost money. Expenses for a campaign can run between 5% and 8% or more of the incremental funds raised. Further, if you are counting on using unrestricted campaign proceeds to fund the budget, you'll find that the largest expenditures tend to occur in the early going when the least amount of

cash is coming in.

Another consideration is the extent to which campaigns can create unrealistic expectations. There is an often heard true story about a boarding school that announced it would receive \$100 million from an alumnus. The morning after the announcement, the faculty were lined up at the Headmaster's door wanting to know when they were going to get their raises. And then there are the ever-important volunteers, who tend to start feeling disappointed unless they receive a steady stream of good news. Such expectations are often out of touch with reality, sometimes wildly so, but expectations, like assumptions, can make life difficult for all.

To Campaign or Not to Campaign, That is the Question

Some level of risk is inherent in every campaign. As is the case with the decisions we make each day in every aspect of our lives, our assessment weighs the benefits against the risks. One helpful way to assess the risk is to seek the advice of experienced consultants who have not only the skill sets required to evaluate your chances of success but also the courage to give you sound advice, even if that advice is not quite what you wanted to hear.

At the end of the day, the decision to move forward with the campaign rests on factors both quantifiable and qualitative, not the least of which is a sense of institutional self-confidence.

Brakeley Briscoe Inc.

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**Serving the Americas
from Connecticut,
California, New York,
Florida and
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BBI'S CLIENT SERVICES

Making the Case for Support

Central to successful fundraising is the case for support. For a capital campaign, you will need an entirely new case. It will be the centerpiece of the campaign. It will set the stage for solicitation strategies and marketing materials. Without a good document an organization has nothing to drive the campaign. It's like sending the sales force out without any materials to describe the product.

Traditionally the case statement is printed; recently more and more are transformed into digital media. A DVD can show-case a proposed building in a virtual tour or capture the passion of volunteers or record testimonials of the beneficiaries served. It is easy to distribute to prospects or to play for them on a personal call. Many organizations also put their case statements on their websites.

Drafting the case during the pre-campaign work can clarify the planning and even define more precisely the scope of the organization's needs. Organizations often draft something that focuses too intensely on financial needs and not on programs and mission. By testing the case statement in the pre-campaign planning study interviews, you can gain valuable

insights on how to refine the case document to make it a more effective soliciting tool.

The words in a case are not carved in stone. The document needs to be flexible. Case writing is a dynamic process; the text should be open to revision as the campaign progresses, to reflect emerging events (such as a mega-gift or a challenge gift). What might work for a healthcare cause won't necessarily work for an art museum. The case should answer the question, "Why?" Nobody gives you a gift because you need money--they give because the cause is bigger than the organization itself and the cause solves a problem that makes for a better community.

Brakeley Briscoe's case writing services include editing existing written material, drafting case briefs for planning studies, creating original case statements and other campaign promotional documents, and developing alternative media concepts and strategies for fundraising. Recently we have provided these services to Canine Companions for Independence, Bellarmine College Preparatory and Transparency International.

Brakeley Briscoe Inc.

*Powerful thinking,
Creative counseling*

Let's Meet

Conferences & Speeches

Association of Science and Technology Centers

Richmond, VA-October 16, 2005
Abbie von Schlegell -- "Managing a Major Gifts Program in Addition to Everything Else"

AHP International Conference

Vancouver, Canada-October 19-23, 2005, BBI exhibiting at Booth 38
George Brakeley will present the AHP Brakeley Award for writing October 21

Maryland Association of Nonprofit Organizations

Frederick, MD-October 20, 2005
Abbie von Schlegell -- "Planning and Building a Successful Capital Campaign"

Blackbaud Annual Conference

Charleston, SC-October 26, 2005
Abbie von Schlegell -- "Getting to YES!"

Maryland Association of Nonprofit Organizations

Bethesda, MD-November 1, 2005
Abbie von Schlegell and Shauna Chabot -- "Getting to YES!" BBI will exhibit.

Anne Arundel Community College Nonprofit Institute

Arnold, MD-November 4, 2005
Abbie von Schlegell -- "Fundraising 101"

CASE District VII

San Francisco, CA-December 4-6, 2005, BBI will exhibit.

Anne Arundel Community College Nonprofit Institute

Arnold, MD-December 9, 2005
Shauna Chabot -- "Trends in Corporate and Foundation Giving"

CASE District II

Pittsburgh, PA-February 4-7, 2006, BBI will exhibit.

Anne Arundel Community College Nonprofit Institute

Arnold, MD-March 21, 2006
Abbie von Schlegell -- "How to Make the Ask"

AFP 43rd International Conference

Atlanta, GA-April 2-5, 2006, BBI exhibiting at Booth 534

CASE District IV

Oklahoma City, OK April 8-12, 2006
George Brakeley -- Panel: "For VPs Only"

AAM Museum Expo

Boston, MA-April 27-May 1, 2006, BBI exhibiting at Booth 510

BBI's Consultants

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