



h Brakeley Briscoe

Considering Philanthropy

Fall 2009

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Offices in Arizona, California, Connecticut, Florida, Georgia, Metro D.C., and New York.

Remembering Our Founder

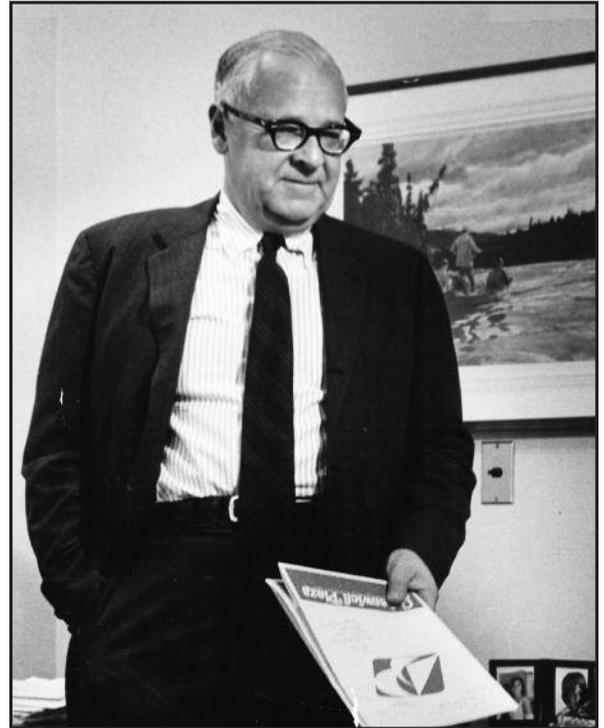
George A. Brakeley, Jr. 1916-2009

George A. Brakeley, Jr., long time leader of Brakeley Briscoe's predecessor companies, died on May 1, 2009, in Naples, FL, at the age of 93. His father, George A. Brakeley, Sr., established the firm in 1919. His son, George A. Brakeley III, currently serves as Chair of Brakeley Briscoe.

Born in Washington, D.C. in 1916, George Brakeley, Jr. attended Chestnut Hill Academy in Philadelphia and was a 1938 graduate of the University of Pennsylvania. A World War II veteran, he served in China and Indo China with the Corps of Engineers, leaving the service as a Captain.

During his long career as a philanthropic fundraising consultant in the United States and Canada, he was an innovator in philanthropy and fundraising, a leading spokesman for the consulting profession, and a founder of the American Association of Fund-Raising Counsel (now the Giving Institute). His career began with John Price Jones, Inc., of New York

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2009 AHP George A. Brakeley Jr. Award Winners

On September 25 Marianne Briscoe, President of Brakeley Briscoe, announced the winners of the George A. Brakeley, Jr.-AHP Journal Award for writing.

Established in 1981, this award honors individuals who donate time and talent to enhance the fundraising profession by writing outstanding articles for the AHP

Journal. The winners are selected by the AHP Journal Advisory Council. Each winner receives a plaque and a check.

The 2009 first place winners are Walter W. Noce, Jr., M.P.H. (retired Vice Chairman, President, and CEO of Children's Hospital Los Angeles) and Claudia A. Looney, FAHP (Senior Vice

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Major Donor Transformations

Moving from a big list of donors making small gifts to a robust major gifts program is a complicated challenge. In seeking a major gift, you are asking your annual or special appeal donors to make significant changes in their attitudes toward your organization. Most annual gifts are made from the “checkbook.” A donor looks at the household budget and decides to make small annual, monthly or one time contributions. Some of these donors have significant capacity in that checkbook. Many have even greater capacity in liquid and illiquid assets of some sort. How do you get your organization out of a high capacity donor’s little gifts column and into the big or at least bigger gifts column?

Patience and Persistence

First, it takes time, patience and persistence. One nonprofit board member commented recently about a major gift prospect, “he has the interest, he has been making small gifts to us, we know he has the capacity, and he is a friend of mine. I am surprised that it has taken us more than 18 months to get him even to consider a gift of \$25,000.”

High-Touch

It also takes “high touch.” In a

fundraising study interview for a performing arts organization, wealthy subscribers said their giving had gone down because they had come to miss the opportunities to engage with the artistic staff and other major donors. Years of funding and staff cuts in the donor cultivation and stewardship programs had taken their toll. Of course, when the gifts get smaller, so do the perks, but these people saw it the other way around.

Beyond Transactional Giving

Often it takes a transition from “transactional” solicitations to conversations about donor investment and impact on the organization and its beneficiaries. A policy study organization had a system of advisory boards where the members were expected to commit \$30,000 annually. They encountered serious challenges getting the corporate members, especially, to increase giving beyond this threshold. These donors had bought their place at the table and did not see additional value to be gained with greater giving.

Direct Response to Major Gifts

Many organizations have large lists of annual donors that have been acquired and maintained through

direct marketing methods—mail, phone or web. There is a certain amount of upgrading possible through focused direct marketing approaches. But for most, the time comes, as one of Brakeley’s most famous consultants, Sy Seymour, once said, “to sit down and apply yourself personally.” Direct engagement with donors, where you give them the bigger picture about the aims and abilities of your organization, is the most important thing you can do to move these donors into the major gift category.

Turning a supporter into a major donor is staff and time intensive. It also requires creativity. High capacity donors are besieged with opportunities to give and give more, as well as with opportunities to meet with major gift officers or come to cultivation events. In almost every case where a prospect becomes a major donor, that high touch relationship is the foundation of the giving. So, difficult as it may be, each major donor prospect requires a strategy aimed at engaging them personally in the life of your organization. Then you can transform the conversation from “give because our audiences, clients, patients or students (or you) will benefit.” It becomes “join us in our work.”

George A. Brakeley Jr. Award Winners

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President of Development, Children’s Hospital Los Angeles) for their article “The Critical Role of Physicians in Fund Development”, which was printed in the spring 2009 AHP Journal. Second place winners are Mary Anne Chern, FAHP, ACFRE (President of White

Memorial Medical Center Charitable Foundation); Steven L. Mourning, FAHP (Partner, Jerold Panis, Linzy and Partners); and Crystal Torres, MBA (Director of Development, Memorial Trust Foundation of Downey Regional Medical Center) for their article

“Hispanic/Latino Philanthropy: Myth vs. Reality”, which was printed in the fall 2009 AHP Journal.

The articles can be found on the AHP Web site at:<http://tinyurl.com/AHPJournal>.

Gems from GAB, Jr.

George Brakeley, Jr. was a prolific writer and commentator on the fundraising profession. Recently we reviewed his 1980 book, "Tested Ways to Successful Fundraising", and learned that the essentials do endure through the ages. Here are a few of our favorites from this book; some of them we have all been using for so long we didn't realize he had coined them.

"Publicity doesn't raise money; someone has to do the asking."

"However well organized and maintained, a prospect list can be no better than the names it contains."

"There are no real short cuts in fundraising."

"It is axiomatic that an institution must spend money in order to raise money..."

Remembering George A. Brakeley, Jr. 1916-2009

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City, which was known at his retirement in 1983 as Brakeley, John Price Jones (today Brakeley Briscoe Inc.). He also founded firms bearing his name in Canada and on the West Coast.

Among his hundreds of internationally and nationally-renowned clients were Harvard University, Columbia-Presbyterian Medical Center (now Presbyterian New York), Memorial Sloan-Kettering, Barnes Hospital (St. Louis), Yale University, Stanford University, McGill University, The Smithsonian Institution, Washington National Cathedral, Kennedy Center for the Performing Arts, and the U.S. Olympic Committee.

Many of his consulting engagements spanned the decades when capital campaigning was

coming of age. In 1979 at Samaritan Health Services and the Samaritan Foundation (now known as Banner Health and Banner Foundation) he did a campaign planning study for a \$5 million campaign. He then counseled the campaign, which raised \$5.2 million. Later, in 1995, he returned to Samaritan and led a campaign study testing a \$50 million capital and endowment goal. Under his guidance Samaritan achieved \$54.2 million.

It is reckoned that, during his 44 year career, he assisted his clients in raising in excess of \$10 billion in today's dollars. He was a Trustee of The Center for the Study of the Presidency and Congress as well as the Washington National Cathedral.

Fundraising Abroad

The world is getting a lot smaller. At the same time our donors and prospects seem to be getting a lot further away. Raising money from constituents based outside the United States is complicated. It can be hard to cultivate friends and prospects who are far away and in a different culture. Tax laws and other regulations can also make it difficult to transfer gifts into a U.S. organization from a foreign location. And when one of your executives or board members travels abroad, it is challenging to manage the logistics to make the trip really productive for the development program. Setting up a fundraising office outside your

headquarters site in the U.S. is an expensive and often hard to justify investment; doing so abroad can be even less productive. But for many organizations, there are groups of prospects in some country or culture that you really shouldn't be engaging just "by e mail."

Brakeley Briscoe has been building resources and skills in international fundraising for more than 20 years. We know about the challenges and we have resources that can make fundraising and constituent relations abroad less difficult and less expensive.

Brakeley Briscoe has offices and affiliates throughout the

world—in the U.S. and also in Asia, Europe and South America. In the 1980s we opened an office in London which has now grown to include operations in Germany, France, Sweden, Hong Kong and Tokyo, plus affiliates in Korea, India and Singapore. We now do business in English, Spanish, French, German, Chinese, Japanese, Korean, and Dutch, plus several Nordic and South Asian languages.

Recently we have formed affiliations with several of South America's leading fundraising consultant firms: Centro de Management Social, Buenos Aires; Noriega Malo y Asociados, Mexico, D.F.; and Recursos

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 Marianne G. Briscoe, President & Managing Director
 Alden F. Briscoe, Executive Vice President, Managing Director
 Melanie Brandston, Managing Director
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LET'S MEET: CONFERENCES AND SPEECHES

September 24-27, 2009

AHP 43rd Annual International Conference; San Francisco, CA. **Tim Snyder** is presenting "Putting the Sizzle in Stewardship". **Stu Smith** is participating in the session "Master Class in Healthcare Philanthropy Leadership: Special Sessions with Si Seymour Award Winners" and managing a session on Idea Exchange called "The Development Audit". **Marianne Briscoe** and **Alden Briscoe** also attending.

October 20, 2009 | 9 a.m. - 12:15 p.m.

Boys and Girls Club Northeast Regional Leadership Conference; Atlantic City, NJ. **Melanie Brandston** presenting on "Balancing Capital Campaigns and Other Development Functions".

October 27-28, 2009

Center for Nonprofit Success San Francisco Fundraising Summit; San Francisco, CA. **Julie Ver Steeg** speaking.

November 12, 2009 | 9 a.m. - 10:15 a.m.

Council for Resource Development (CRD) 43rd Annual National Conference; Washington, D.C. **Melanie Brandston** presenting "Donors are People Too". **Tim Snyder** also attending.

November 18, 2009

AFP Golden Gate Chapter 2009 National Philanthropy Day; San Francisco, CA. **Julie Ver Steeg** attending for Brakeley Briscoe.

November 20, 2009

AFP Silicon Valley Chapter National Philanthropy Day; Santa Clara, CA. **Julie Ver Steeg** attending for Brakeley Briscoe.

Comings and Goings at BBI

Melanie Brandston has been appointed Managing Director at Brakeley Briscoe. This promotion makes her an officer with responsibility for overall corporate strategy. Melanie previously served Brakeley Briscoe as Associate Managing Director for the Northeast and as Senior Vice President. From 1986 to 1994 she worked with Brakeley Briscoe (then Brakeley, John Price Jones) as Vice President. She returned to the firm in 2003. She is former Director of Development-United States at Orbis International and Director of Development at Literacy Volunteers (now Literacy Partners).

Joel Evans, Vice President, has become Director of Development at Saint Anthony Foundation, San Francisco.

Fundraising Abroad

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Filantropicos, San Jose, CR. These collaborations have led to consultancies with major educational institutions in Colombia and Brazil and with WWF Mexico. These partners, as well as those in Europe and Asia, also position Brakeley Briscoe to serve U.S. organizations with concentrations of alumni and other prospects in foreign communities. Call on us; we have a lot of fundraising abroad services that can keep you close to your most distant prospects.

If you are looking for a speaker, please send inquiries to info@BrakeleyBriscoe.com.
 For more information about Brakeley Briscoe, please visit us at www.BrakeleyBriscoe.com.