

# Considering Philanthropy

**BRAKELEY  
BRISCOE**

**FUNDRAISING & MANAGEMENT CONSULTANTS**

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

## *In this Issue*

- Mega Gift at Virginia Museum
- Assumption's Break Out Campaign
- Stuart R. Smith Joins BBI
- Asking Women  
*It takes longer to cultivate  
Address "bag lady" fears*
- Let's Meet

## *BBI Services*

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Planned giving  
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Strategic planning  
Interim management  
Capacity building

## Asking Women. Asking Men. Is There a Difference?

*Abbie J. von Schlegell, CFRE with assistance from Christine Jeffers*

Is there a difference between how one solicits a woman vs. a man? Should women be engaged and involved differently from the ways in which men have traditionally interacted with an organization? Are there necessary steps that should precede a solicitation of a woman vs. an ask of a man?

Fundraisers have long asserted that, unlike men, women shy away from competing with their peers to make the largest gift, and they usually do not want their names on buildings. Compared to men, they are more likely to volunteer before giving and seek closer contact with the charities they support. Men tend to give to enhance their own standing or maintain the status quo, it is believed, while women give to promote social change or help others less fortunate. At the Chicago Foundation for Women they put it this way:

"give us the money; we'll make change."

*Creating a language of change.* A wise colleague, active with a women's foundation, once talked about the need to create a "language of change, of hope, of action and possible solutions." She posed the question about how best to rally and inspire women - to learn more about how best to involve and engage women as donors and volunteers in support of our organizations.

Even the most recent literature on philanthropy is full of assertions that women and men contributors are different. Consider the following observations about gender differences in giving.

### **Women make smaller gifts**

Lori Stevens, director of the Women and Leadership task force at Harvard University,

*Continued on p. 2*

## Major Structured Gift Leads Campaign at Virginia Museum of Fine Arts

In 1999 the Virginia Museum of Fine Arts began the "quiet phase" of its "Building for the Future" campaign, with an initial goal of \$100 million for renovation and expansion, endowment and operations. Now nearly completed, the campaign has written a new chapter in the story of private support for museums generally and especially with respect to the private-public partnership represented by the

Museum and the Commonwealth of Virginia. VMFA is one of just four state-supported museums in the US.

The November 20, 2005, dazzling groundbreaking marked the beginning of its long planned expansion and campus transformation, and heralded the final phase of a Herculean effort to secure the needed funding. This campaign has thrived under the

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## Women Take Longer to Decide to Give; Worry about Running out of Money

*Continued from p. 1*

reflects what many fundraisers have experienced. She recently reported that a matching gift fund helped generate nearly \$19 million from women donors in just 110 business days. Yet, she told a reporter, "we've made a lot of progress with donors in the \$100,000 to \$200,000 range, but we're having a hard time getting to that next level: donors who give around \$1 million."

*Fundraisers still focus on men.* Some researchers have argued that small gifts by women who can easily afford to give more are rooted in insensitive fundraising practices that ignore women's contributions, reflect male rather than female priorities, and exclude women from top leadership positions. UCLA's focus groups, for example, found instances in which married women, even when the woman signed the couple's check to make a gift, were not acknowledged in thank-you notes sent to their husbands.

Empirical data with large populations, while not controlling for every variable, continue to find a stubborn lag in gift size by women relative to men. A recent study by HNQ Digital examined giving patterns of more than two thousand affluent men and women with household incomes of \$150,000 or more and net assets of over \$500,000. Gender differences again emerged. Only 4 percent of women reported that their largest single gift was in the \$10,000 to \$24,000 range, while 16 percent of men made their largest gift in that amount. Similarly, 40 percent of women said their largest single gift was \$1,000 or less, compared to 28 percent of men.

### **It takes longer to cultivate women**

A fundraising officer for feminist causes observed, "Often the women I ask agonize over the amount of their contributions; they need time to think

about it. . . or they say they want to discuss it with their husbands. The men usually commit (or refuse) on the spot. . . . No man has ever told me he wants to consult his wife. I really do hope that this is changing."

Fundraisers continue to hold that because many women lack financial skills or fear they will outlive their money--the oft-cited "bag lady syndrome"--they take longer to decide to make a sizable gift. They also are likely to require a closer relationship with the organization than men and ask questions before giving, making the building of relationships with women all the more important.

### **We have a lot more to learn**

What conclusions about gender-based giving can we draw from the wealth of anecdotal observations and few large-scale studies that exist?

*Women's philanthropy is growing.* First, women are flexing their philanthropic muscle, demanding more perks and recognition, even competing with other donors for visibility in certain situations. The resume-enhancing and business-building aspects of charity have not escaped the notice of women ascending the corporate ladder or promoting their own enterprises. Female business owners like those at Vera Bradley Designs in Fort Wayne Indiana, for example, enjoy the profile their company has earned from raising big money for cancer research.

Second, we still do not know conclusively whether women give smaller amounts to charity than men of similar means do, because there is no large scale study that controls for income levels, number of dependents, and all the variables that could skew results. Nevertheless, several studies have found a significant difference in giving levels

among men and women, and fundraising executives continue to observe a giving gap.

*Women prefer bequests.* Women's net worth is still less than men's. As one researcher noted, the mean net worth of female-headed households in a national survey of consumer finances was \$92,826, compared to \$186,862 for male-headed households. The average net worth among never-married women's households was \$42,804, only 39 percent of the net worth of never-married male households.

Finally, fundraisers have been observing anecdotally for years, with frustration, that it takes women longer than men to make major contributions. These observations appear to be corroborated by quantitative research on planned giving. A study of such gifts to eight different capital campaigns held between 1988 and 1998 found that women's bequests accounted for 22 percent of the total in all eight campaigns, more than three times the percentage for male bequests (7 percent).

*"Bag lady" fears.* The implication is that women, who live seven years longer on average than men, are concerned about having enough money to live on and therefore wait until death to make their largest gifts. In other words, the bag lady syndrome lives on. One study found that 58 percent of women say they are worried about their financial future compared with 42 percent of men. "Financial security and independence rank higher on women's lists of financial objectives;" and an investment manager who founded a financial services company for women wrote recently, "Gifting strategies that enable older women to live out their days in comfort, after which all or most of their remaining wealth goes to charity are valid".

# Assumption College's Breakout Campaign Meets Kresge Challenge, Raises Record Gift

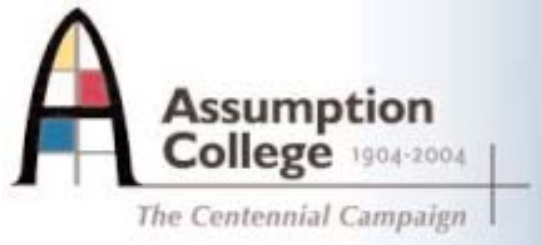
Assumption College is a 2,600-student liberal arts college owned and operated by the Augustinians of the Assumption, an order of the Roman Catholic priesthood.

Worcester, MA, is home to 170,000 people and no fewer than twelve colleges and uni-

versities. While several of these institutions are national in reach, most are not. In the pecking order of those twelve, Assumption is seen as somewhere in the middle.

Worcester is a blue-collar town, and Assumption is a proudly blue-collar school. A very high percentage of its students are first-generation college-goers, mostly from modest socio-economic circumstances. Historically Assumption has produced "teachers,

preachers and social workers." Only in recent years has it produced more professionals and businesspersons.



Assumption's fundraising track record had been modest. The annual fund had never reached \$1 million in any one

year, with an alumni participation rate of 26 percent. The last campaign raised \$15 million, much of it in non-cash forms; and there had been very little meaningful volunteer involvement in either annual or capital fundraising. This was a college of modest distinction, a modest history, and modest expectations of itself. Our biggest challenge was to change that mind-set.

Brakeley Briscoe was retained in late 1999 to conduct a study testing a goal of \$40 million. While we did give them a

"go" recommendation with regard to having a campaign, we could support only a \$30 million goal, and even that figure presumed a "sure thing" government grant of \$5 million for the proposed science center. BBI was subsequently retained to provide ongoing strategic counsel.

As of February of 2006, The Centennial Campaign had raised in excess of \$27 million, despite the fact that only \$3.2 million has come from the Federal government. Along the way the College obtained the largest gift ever from a living individual (by a multiple of five); had completed its new science center (and met the terms of a very challenging Kresge Foundation matching grant in the process); and had gotten its Annual Fund comfortably over \$1 million a year. The campaign is a model of the synergistic benefits of the "right" leadership team of President, Campaign Chairman and Chief Development Officer.

## *Museum Far Exceeds \$100 Million Goal*

*Continued from p. 1*

leadership of campaign chair, Stanley F. Pauley, chairman and CEO of Carpenter Co., whose \$5 million gift led the way early on.

Brakeley Briscoe counseled the campaign from its inception and worked in close coordination with the museum's Vice President for Development, Peter Wagner, and three successive Board chairs and two Directors. The campaign will formally conclude in June, 2006, having raised more than \$170 million.

When the campaign ends, it will have spanned seven years, with four goal increases to meet inflationary construction materials costs over that period. The highlight of giving to VFMA during this campaign was the receipt of a gift from Frances McGlothlin, a trustee of VMFA,

and her husband James, valued at more than \$100 million. Like so many mega-gifts, this one is a

structured commitment made up of many components. It includes \$10 million earmarked for the museum expansion/transformation capital campaign, which, in May 2005, when it was given, represented the largest private gift to the campaign to date (the Commonwealth of Virginia has contributed more than \$42 million to the expansion thus far.)

By far the most significant part of the McGlothlins' commitment, however, was their gift of an extraordinary collec-

tion of 19th and 20th century American art, worth in excess of \$70 million, and

a significant pledge of \$20 million for the endowment to support

American art at the museum. The couple's commitment will support the creation of the American Galleries in the new museum wing, both of which will bear the McGlothlins' name.

This magnificent commitment and the many others that have contributed to the campaign's success represent an exemplar of the synergy of a strong case, a constituency that is ready to respond, and a first-rate team of volunteers and institutional leadership.



**Brakeley Briscoe Inc.**

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## Let's Meet Conferences & Speeches

### AAM Museum Expo

Boston, MA-April 27-May 1, 2006, BBI exhibiting at Booth 510. **Abbie von Schlegell, Melanie Branston, Christine Jeffers** - attending

### AFP Maryland - Fundraising Day in Maryland

Baltimore, MD - June 5, 2006, BBI exhibiting  
**Abbie von Schlegell** - "Getting to Yes"

### Blackbaud 2006 Canadian Conference on Philanthropy

Vancouver, Canada - June 12-13, 2006  
**Marianne Briscoe** - "Planning a Big Campaign"

### Coordinators of Volunteers of Anne Arundel County, MD (COVAAC)

Annapolis, MD - June 16, 2006  
**Abbie von Schlegell** - "ABC's of Fundraising"

### SPRY (Setting Priorities in Retirement Years) Annual Conference

Washington, DC - June 20, 2006  
**Abbie von Schlegell** - Presentation

### AFP New York - Fundraising Day in New York

New York, New York - June 23, 2006  
**Marianne Briscoe** - "Is the Capital Campaign Dead?"

**George Brakeley III** - Career Counseling  
**Jacqueline Venable** - "The Changing Face of Major Gifts Fundraising - Public, Private, Alumni and Friend"

### Philanthropic Service for Institutions - International Conference on Philanthropy

Jacksonville, FL - June 28-30, 2006  
**Abbie von Schlegell** - "Using Volunteers in the Major Gifts Process"

### Council for Resource Development - President's Fundraising Workshop

Park City, UT - July 17-18, 2006  
**Melanie Brandston, Marianne Briscoe** - attending

### Blackbaud - Annual Conference on Philanthropy

Charleston, SC - October 22-25, 2006  
**Abbie von Schlegell** - "The Role of Non-Profit Boards In TODAY'S World"

### Association of Science & Technology Centers (ASTC)

Louisville, KY - October 28-31, 2006  
**Abbie von Schlegell** - "Building Capacity in Your Major Gifts Program"

### Anne Arundel Community College

Annapolis, MD - November 17, 2006  
**Abbie von Schlegell** - "Introduction to Fundraising"

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### BBI DEVELOPMENTS

## Stuart R. Smith Joins BBI

Stuart R. Smith, an award winning specialist in hospital fundraising management, has joined Brakeley Briscoe Inc. as Managing Director. Stu will have responsibility for the firm's health-care practice nationally and will provide other fundraising and management consulting services from his base in Phoenix, AZ.

Stu comes to BBI after 27 years as President and CEO of longtime Brakeley client Banner Health Foundation and its predecessor, Samaritan Foundation. The foundation is the philanthropic resource for Banner Health, one of the nation's largest not-for-profit, non-secular health systems and Arizona's leading health care provider. He also served as Executive Director of the Shadyside Hospital Foundation in Pittsburgh and as Director

of Community Relations and Development at United Hospital in New York.

Stu served as chair of the Association for Healthcare Philanthropy (AHP) in 2002. He also served six years as Chair of AHP's Board of Certification and is a founding board member of Certified Fund Raising International (CFRE.) He has received many awards including the Si Seymour Award, AHP's international honors award, AHP's Award of Excellence for Capital Campaigns, and the AFP Greater Arizona's "Outstanding Executive Fund Raiser" award. He has just been named the 2006 recipient of the Linda Vollstedt Award for service & leadership in women's sports, bestowed by the Banner Health Foundation and Safeway International LPGA Golf Tournament.

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