

Considering Philanthropy

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BRISCOE**

FUNDRAISING & MANAGEMENT CONSULTANTS

Spring, 2008

Offices in California, Connecticut, New York, Arizona, Georgia and Metro DC

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Going Beyond Cost-per-Dollar; Benchmarking against the Best

Stuart R. Smith, FAHP, CFRE, Managing Director

Benchmarking systematically compares one organization's business processes and standards with that of industry leaders. The goal is to observe and create new and improved processes used by the top industry performers who set the standard that will enable your organization to improve its performance.

Performance benchmarking is a manager's tool which positions today's Chief Development Officer to answer the following questions:

- Are you using your budget resources wisely?
- Are you securing the best return on budgeted investment?

Fundraising has moved from a value-added function to an integral part of financial planning for non-profits. Because philanthropy is now understood as a "countable" revenue stream with net income and debt capacity, chief development officers are being asked to demonstrate their use of organizational resources at the highest levels of return and productivity.

The objective of performance benchmarking is to identify and enable the incorporation of an industry's best practices into your development program. Methodologies and tactics are the absolutes; however, variables such as environment, personnel and budget are the impact factors. Thus, CDO's should

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Community Colleges Step Up To Major Gifts Campaigning

Almost 50% of the students going to college today are attending one of the country's 1,195 community colleges. As publicly supported institutions, many community colleges have not historically given as much attention to private-sector fundraising as they have to securing and maintaining their government funding.

This is now changing. In fact, there is a sea-change underway. More and more community college leaders now see fundraising as a necessary priority because of government

funding cuts and the need to keep tuition affordable. Other leaders see fundraising as an opportunity to assist in meeting their institutions' strategically planned physical and programmatic growth. Such leaders recognize that an established fundraising program is an opportunity to build relationships with the corporate and civic communities, as well as their alumni.

These relationships are leading to investments in facilities, programs and endowment from the private sector. It is these visionary

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Brakeley Briscoe Inc.

Benchmarking Measures Achievement; Can Justify Additional Resources

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seek improvement based upon best practices but should not attempt to “absolutely mimic” the benchmark numerically. The benchmark may be “hit”, but there will always be uncontrollable factors that are unique to each organization and its environment. For instance, one organization may not have similar demographics to another, such as a rural service base vs. a “high-end” suburban gated community. Nor can the six figure bequest be repeated the following year, much less with a 10% increase. Therefore, progress toward the desired performance benchmark should be the objective, not the benchmark number itself. As performance toward the benchmark is measured, it can be monitored with regard to the organization’s adoption of best practices and the investment by the organization to implement them.

The key to successful performance benchmarking rests with the organization’s understanding of its purpose and management’s commitment to support the process.

It’s More than Cost per Dollar

Today’s thinking no longer embraces the statement “it should cost x cents to raise a dollar”. Just as there is no real average family of 2.5 people, there can be no absolute “dime to a dollar” real cost benchmark. Management’s thinking must shift from keeping fundraising costs down by expense reduction. This limits program investment and staffing. The new view supported by benchmarking leans toward measuring return on investment, thereby focusing on securing the highest return on budgeted investment. Performance benchmarking is a process or a video, not a fixed snap shot.

Within the resources available, adoption of best practices may require several budget cycles; and, much like any new program, investment return may take more than one cycle to rise.

However, by tracking progress and investing in the methodologies that demonstrate high return, the performance benchmark will move toward the desired outcome. If not, then timely adjustments can be adopted.

Monthly Tracking Guides Progress

Performance benchmarking is supported by a monthly tracking system to insure progress toward annual targets. Data collection is crucial to this process and must be responsive to the need of real time information gathering and reporting. Data gathering is no fun so it is important that the team be informed about process and purpose and is supported by a capable data system. The development staff must understand and adhere to honest and timely reporting practices. Open data sharing amongst the team is mandatory. Genuine agreement on the “definition of terms” regarding the data collection is absolute. For example, what constitutes a move or contact; how is a pledge counted; when should an “ask” be delayed and for what purpose?

Once implemented, the willingness of the development team to discuss, alter and accept change due to findings and best practice implementation must be followed. As this performance discipline is practiced, a cultural acceptance for benchmarking will follow. New organizational resources can be justified, and retention or elimination of programs can also be warranted through benchmarked outcomes. This process supports objective decisions eliminating “sacred cows” and champions best practice, which moves fundraising outcomes up as a predictable consequence.

There will be Uncontrollable Factors

There are, of course, common controllable and uncontrollable factors that have been identified through many current industry benchmark programs. Factors which an organization may have no control over are predominantly

observed in three areas:

1. The organization’s efforts to attract philanthropic support and longevity of its fundraising effort (e.g., absence of, or a weak major gift program).
2. The organization’s case for support (e.g., limited appeal).
3. The economic capacity of the organizational constituents. (e.g., geographic factors)

The presence of one or all three of these factors could be seen as seriously damaging to an organization seeking to raise a dollar with a dime philosophy; but using knowledge of these factors when selecting performance-benchmarked fundraising methods could deliver appropriate returns for the enlightened non-profit development program.

Equally predictive are three major controllable factors seen in successful benchmarked organizations:

1. Development staffing levels for higher performing fundraising programs are higher.
2. Longer tenure of the fundraising staff fosters the understanding that this is a relationship business.
3. Budgets in successful fundraising organizations are stronger, reflecting the first two observations; they also frequently include resources supporting a major campaign.

It’s not about Absolutes

The performance value of benchmarking can be seen in the deliverables. Benchmarking is not a fixed outcome, nor an absolute number; it is a process toward a goal which is derived from the top performers in your industry. The objective is to move your organization toward and into that Best Practice Performance Group by adopting their best practices.

Norwalk Community College's Breakout Campaign Raises Major Gifts from Individuals

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leaders who are coming to Brakeley Briscoe for direction and support on how not only to conduct their first-ever major capital campaigns, but also to conduct successful transformational campaigns.

While corporations are often eager to support a college's plans in ways that will spur economic development and employee training, a transformational campaign aims to secure philanthropically-based investments that will substantially change the institution's course.

Norwalk Aims for \$16 Million

Norwalk Community College Foundation (NCCF), for example, is just one Brakeley Briscoe client that is undertaking its first transformational campaign, and the generosity from the area's residents and companies is setting new records. The Brakeley Briscoe campaign planning study determined that NCCF's goal of \$15 million, while ambitious, was achievable. Brakeley Briscoe consultants recommended that number as a "silent phase" goal. What ever was raised within the first 18 months would determine the final goal that would be announced to the public and the community.

Standout Leadership Giving

The message was heard loud and clear: both the residents of the eleven communities served by NCC and the business community – inspired by exemplary giving by the Board of the College's Foundation – have responded magnificently. When the campaign was publicly announced on October 20, (2007) more than \$16 million had been committed with more on the way.

Campaign leadership was available from the Foundation's board, in part because the NCCF had made gover-

nance a top priority prior to the campaign.

A new president, David Levinson, the new Foundation executive director (a retired Fortune 500 Executive), and new board members that included some of the community's most distinguished residents, have all helped to enhance NCC's credibility and make a case for its ambitious facilities and academic plans.

Individual Giving Leads the Way

Brakeley Briscoe has guided the NCCF campaign committee with campaign preparation, prospect identification and especially strategies for securing the lead gifts from the board.



Thanks to a major anonymous challenge, the Board and the campaign leadership were successful in achieving 100% Board participation and in raising half of the campaign goal.

Approaches to corporations have resulted in commitments ranging from \$5,000 to \$3.75 million. In fact, individuals have provided 64% of the total dollars committed to the campaign, corporations 31% and foundations 5%. This defies the presumption that corporations and foundations are the most generous to community colleges.

The College's leadership and friends have invested in the future of NCC. Their support has prompted new friends to also invest at levels never considered before this campaign.

Senior VP Sara O'Neal Heads New BBI Office in Atlanta

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Sara served as the Regional Director of Major Gifts for the Southeast and then the Midwest regions for Sierra Club's \$92 million Centennial Campaign before assuming the position of Director of Major Gifts - East (of the Rockies) in the Washington, D.C. Office.

Sara started her professional fundraising career at Capital Consortium in Raleigh, NC where she contributed to the premier issue of the North Carolina Grantseeking Directory that was the precursor to the Georgia Grantseeking Directory.

Sara holds a BS degree from Georgia State University. She has served as Director of Development for the

Atlanta Ballet and the Feminist Women's Health Center. Her former clients include: The YWCA of Greater Atlanta, Jerusalem House, GA Center for Children, Nexus, Training and Counseling Center at St. Luke's, Georgia Association of Pastoral Counseling and the Governor's Environmental Advisory Council.

Currently a volunteer with the Montgomery (AL) Symphony League and on the Boards of Directors for the Kelly Bartlett Conservancy and Art Papers, Sara is also a member of the CDC Atlanta Advocacy Council and the Atlanta Chapter of the Association of Fundraising Professionals. She is teaching two courses this spring for the Duke Nonprofit Management Program.

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BBI DEVELOPMENTS

New BBI Southeast Office

Chair George A. Brakeley III and Senior Vice President Sara O'Neal opened Brakeley Briscoe's Southeast regional office with visits to past clients and friends at Emory University, Center for Disease Control Foundation, Pace Academy, Morehouse School of Medicine, Agnes Scott College, the Woodruff Foundation, the J. Bulow Campbell Foundation, and The Tull Foundation.

Sara, who heads this office, has over 20 years of experience in fundraising and strategic planning. Most recently she served as Executive Director of WildLaw, a southeastern nonprofit environmental law firm with offices in five states. Sara spent nine years as President of Green Pursuits, a fundraising and strategic planning consulting firm whose clients included environmental, arts, human services, and faith-based nonprofits.

Sara was featured in a best practices study focused on training and capacity building funded by the David and Lucile Packard Foundation: *Echoes from the Field: Proven Capacity-Building Principles for Nonprofits.*

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**Contact the SE Regional Office at: 185
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30307 Tel 404-524-6150**

Powerful thinking Creative counseling

Let's Meet Conferences & Speeches

AFP 45th Annual International Conference San Diego, CA - March 30 - April 2, 2008, BBI exhibiting at booth 410. **Marianne Briscoe** - "Is the Capital Campaign Dead?" **Juliana Ver Steeg, Alden Briscoe, Timothy Snyder, Andrea Morgan** - attending.

American Association of Community Colleges 88th Annual Convention Philadelphia, PA - April 5 - 8, 2008, **Melanie Brandston** - attending.

AAM Annual Meeting Denver, CO - April 27 - May 1, 2008, BBI exhibiting at booth 855. **Marianne Briscoe**, "Deconstructing the Campaign Planning Study." **Alden Briscoe** - attending.

AFP Greater Arizona Phoenix, AZ - April 30, 2008, **Stuart Smith** - "15 Rules to Survive by to be Successful in Your Development Career."

AFP Hemispheric Conference Mexico City, Mexico - May 8 - 9, 2008, **Marianne Briscoe** - "Capital Campaigns and the New Charitable Investors" and "Rethinking the Campaign Planning Study."

AFP Maryland Philanthropy Day Towson, MD - May 15, 2008, **Shauna Chabot** - attending.

AHP Mid-Atlantic Regional Conference Pittsburgh, PA - June 1 - 3, 2008, **Stuart Smith** - "Major Gifts, Moves Management & Metrics" **Timothy Snyder** - attending.

AFP Fundraising Day in New York, New York, NY - June 13, 2008. **Melanie Brandston** - attending.

Philanthropic Service for Institutions Conference Tucson, AZ - June 16 - 19, 2008, **Stuart Smith** - "Surviving & Thriving Through the Changing Environment of Healthcare" and "The Rx for Engaging Physicians."

CASE International Conference San Francisco, CA - June 18 - 20, 2008. **Brakeley Briscoe Inc. and Brakeley Ltd. representatives** - attending.

AHP Pacific Conference Portland, OR - June 22 - 24, 2008, **Stuart Smith** - attending.

AHP Southeast Conference Ponte Vedra Beach, FL - June 29 - July 1, 2008, **Stuart Smith, Sara O'Neal** - attending.

CASE Summit 2008 for Advancement Leaders New York, NY - July 13-15, 2008. **George Brakeley** - attending.

AFP Monterey Bay Monterey Bay, CA - August 8, 2008, **Marianne Briscoe** - Speaking, title TBD

AHP International Conference Chicago, IL - September 24 - 28, 2008, BBI exhibiting at booth 417. **George Brakeley presents AHP Journal Award.** **Stuart Smith** - attending.

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President & Managing Director

Marianne G. Briscoe

Executive VP & Managing Director

Alden F. Briscoe

Managing Director - Health Care Practice Stuart R. Smith

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