



# h Brakeley Briscoe

## Considering Philanthropy

Winter 2009

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### Brakeley Briscoe Services

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## *The Most Challenging of Times*

As shock after economic shock shakes our world, philanthropy and nonprofits have been hit hard. We know that managers are making painful cuts in both staff and services.

### *Keep your donors close and your prospects closer*

In hard times it is natural to want to hunker down. We think that is the biggest mistake a fundraising program can make right now. Famous military strategist Sun-tzu said, "Keep your friends close, and your enemies closer." Donors and prospects are certainly our friends, not our enemies. But we urge you to "keep your donors close and your prospects closer."

It may not be timely to ask a donor or prospect for a major gift right now. But you need to keep your connections alive and your story in front of each one. When times get better you want to be remembered and appreciated for what you did during the hard times. And you just never know who has the will and the resources to make a gift now. Don't decide for your donors that they can't give. Be understanding if they can't; but be sure they know you can still do important things with their gifts.

### *Resilient philanthropy*

Philanthropy endures, and sustains. The best historical account I have seen on this topic is "Resilient Philanthropy," by Bradford Wm. Voigt in the Sept-Oct 2008 issue of *Advancing Philanthropy*, available online at the AFP Web site or by contacting Brakeley Briscoe.

*-- Marianne Briscoe, President*

## *Campaigning in Hard Times*

*by Melanie Brandston, Associate Managing Director*

The Legacy of Excellence Campaign for King's College proved that taking the time to plan a transformational campaign is worth the discipline, focus and patience. This is even truer when the economic environment would suggest that it is better to wait rather than proceed.

King's College is a liberal arts Catholic college located on a small urban campus in Wilkes-Barre, Pennsylvania. More than 95% of students receive institutional financial aid and 40% are first-generation college attendees, mostly from modest socio-economic circumstances. This

student demographic has not changed much since King's was founded in 1946.

In mid-2002, King's retained Brakeley Briscoe to conduct a campaign planning study. A previous campaign for \$22 million was successfully completed in 2000, but many facilities and endowment needs remained unfunded. There was a new president, Rev. Thomas J. O'Hara, C.S.C., Ph.D. '71, the first alumnus to head the College. Fr. O'Hara knew that critical to the College's future was investing in the College's facilities, grounds and endowment resources.

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## King's College Campaign Weathers Recessions

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In addition, King's was aware that the College needed to take an active part in an essential rebuilding of downtown Wilkes-Barre. A feature article in *Chronicle of Higher Education* describes the situation best. (May 16, 2008, "Struggling Communities Turn to Colleges" by Karin Fischer.)

Brakeley Briscoe conducted its campaign planning study in early 2003, just after the start of the Iraq War and while there was considerable economic uncertainty. Some—but not all—interviewees admitted that the timing of their gifts could depend somewhat on the economy. Still, they were ready to support the College with gifts never considered before as long as more alumni were approached to support their alma mater.

### *Use down time to cultivate, plan*

With a Brakeley Briscoe recommended "working goal" of \$25 million, "silent phase" campaigning started in summer 2003. King's took advantage of the slow economic times to do much needed, behind-the-scenes, planning and preparation. King's reorganized staff to support a donor-centered campaign. They enlisted leadership and finalized the key needs that would comprise the Legacy of Excellence Campaign. Alumni prospect identification was a top priority since past campaigns had focused on friends and alumni within a 50-mile radius of campus. A Trustee-based campaign leadership group headed by John O'Brien '64 assisted Fr. O'Hara from the start and was of great value throughout the 5-year campaign period.

The board of trustees stepped up early and throughout the campaign. They committed a record-breaking \$15.2 million with 100 percent



participation. This became a catalyst for increased and new gifts from others near and far away from northeast Pennsylvania.

### *Longer campaign time lines*

The campaign required five years, since campaign planning started during an economic downturn, a strategy that is common in campaigns run during difficult times. The fact that King's did not sit back and wait until the economy improved placed the College far ahead of other college and nonprofit campaigns in the region. King's attracted unprecedented gifts from current and new donors. The fact that they took the time to prepare was a reason for an \$8 million unrestricted commitment from an anonymous donor. And for the first time non-trustee alumni gave 16% of the dollars raised. Annual giving surpassed its goal by 38%. Indeed, King's alumni realized that it was time to give back to their school.

The community showed its support of King's as well with investments in new initiatives such as a Shoal Center for Community Engagement and Learning named after a local area businessman and his family, a Wilkes-Barre native and loyal trustee of King's.

King's celebrated its Legacy of Excellence campaign's success in May 2008. \$38 million was raised, 73% more than the previous campaign and 52% over the "working" goal set in 2003. The King's community is celebrating their transformational success just as another economic recession is upon us.

### *Lessons learned*

Lessons learned: Many organizations need time to effectively prepare for mega-gifts and donor-centered campaigns. A recessionary period can be an excellent time to build necessary infrastructure and undertake cultivation activities. The focus should be twofold. First: prepare for solicitations that are primed for great results regardless of the economy or as soon as the economy improves. Second: identify prospects with six-figure-plus giving capacity where giving inclination requires concerted donor-centered relationship-building activities. Focus on the cultivation with the realization that relationship-building takes time, focus and investment. New gifts will be achieved in the relatively near future; transformational gifts from new donors are more likely in the next campaign (and there always is another campaign on the horizon).

As 2008 comes to a close many believe we are in worst recession since the 1980s. While nonprofits should review their fundraising goals and plans, we remain firm in our recommendation that a recessionary time is an excellent occasion to plan, prepare and get ready for when times get better.

## How Community Colleges Build Endowments

To help Anne Arundel Community College Foundation (MD) plan a campaign that will include an endowment goal, Brakeley Briscoe surveyed endowment programs at other community colleges and public and private four-year institutions.

Our findings showed that philosophies and policies for endowments and endowed funds varied widely. The urgent need for private fundraising in community colleges is relatively new; therefore, strategies and policies are not as uniform as in private higher education, private



secondary education, or even public four-year institutions, which have all been raising endowment dollars in greater amounts and for longer periods of time.

Community college fundraising leaders' views on endowments ran the gamut from, "I'm not really big on endowments—unless they're large; they don't make much impact," to, "No publicly funded school ever became great on public funds." Yet the value of endowment in higher education finance is well proven.

### *Support structures vary*

Community college foundation and development staff structures, the funding sources for salaries, foundation operating needs, and endowment administration are quite varied. Best practices are not uniform. The make-up of the

advancement offices and sources of funding are usually a product of the particular environment of the college in question.

Some development staff, like the ones at Anne Arundel Community College Foundation, are state employees, and the operating budget of the Foundation flows from public funds. In the case of Norwalk Community College (CT) the fundraising staff are all employees of the Foundation, and have a continuing and annual need for operating dollars that is largely unmet by either the state or their annual fundraising activities. Norwalk's Foundation board has therefore voted to charge a 1% administrative fee on endowment gifts to help defray operating costs. With Valencia Community College in Orlando, FL, the operating expenses of the Foundation are almost completely defrayed by the rental income it receives from real estate investments.

### *Creative endowment strategies*

Our research uncovered a number of examples of funds and programs that represent interesting, effective and "out-of-the-box" thinking on the part of the two- and four-year public colleges. Some attract funding from unusual sources and some qualify for matching grants from public funds. At King's College, Wilkes Barre, PA, the Shoval Center for Community Engagement and Learning was endowed and named by an individual and was so attractive that others, including foundations, contributed to it in large amounts. At SUNY

Dutchess Community College the students created an endowment. They voted to have \$10 per semester added to each student's bill. They also qualified for a Title III matching grant in public funds. Some use innovative



fundraising events. Valencia Community College gets everything donated and every penny raised goes to scholarships. They have a wine tasting and food event where the entire community gets involved. Others build endowments using non-fundraising initiatives like cell phone towers and billboards that fund faculty development endowments. Creative, resourceful thinking, that follows the strengths of the institution and its community bring terrific results for endowment fundraising.

### *Focus on strengths and needs*

While many community colleges have relatively small endowments and most of their funds are restricted to scholarships, a small number have been successful in creating endowments for a wider range of purposes. Schools wishing to go beyond scholarship align endowments with their own mission, vision, needs, goals, and strategic direction. Furthermore, by seeking endowment for the strengths and strategic goals of the institution, endowment fundraising can take on greater urgency and importance.

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**LET'S MEET: CONFERENCES AND SPEECHES**

**December 8, 2008 | 10:45 a.m.**

CASE VII Annual District Conference; San Francisco, CA. **Marianne Briscoe** and Stacey Heckel of Anne Arundel Community College present "Going Beyond the Numbers: New Strategies for Measuring Fundraising Success."

**January 14, 2009**

AFP California Capital Chapter Meeting; Sacramento, CA. **Susan Rice** presenting on major gifts.

**February 21-23, 2009**

World Congress of Muslim Philanthropists Conference; Dubai. **Brakeley Limited** attending.

**March 29-April 1, 2009**

AFP 46th Annual International Conference; New Orleans, LA. **Brakeley Briscoe** exhibiting at booth 611.

**September 23-27, 2009**

AHP 43rd Annual International Conference; San Francisco, CA. **Brakeley Briscoe** exhibiting at booth 205.

## Community Colleges Build Endowments

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Endowed chairs can help generate excitement and support from faculty of the college. Endowed programs and projects can provide dependable and needed capital in areas most attractive to donors and responsive to the needs of the institution.

Innovative programs that include students provide a flow of endowed funds and an educational opportunity to show the benefits of philanthropy while the students are still in school. Some schools leverage public funds for buildings or services to motivate private donors to give matches for endowment or other purposes.

As public funding for community colleges diminishes and as enrollments grow, private sector support for these institutions is increasingly important. And as traditional funding sources become less certain, the strategic value of an endowment becomes ever more clear to college leaders and benefactors.



If you are looking for a public speaker, please send inquiries to [info@brakeleybriscoe.com](mailto:info@brakeleybriscoe.com). For more information about Brakeley Briscoe, please visit us at [www.brakeleybriscoe.com](http://www.brakeleybriscoe.com).