Finding the Joy
A Workshop on Philanthropy for Nurse Leaders
Today’s Presenter

• Coleen Southwell, AVP/Sr. Philanthropy Officer, Cardinal Stritch University

• Experience – Director of Development, University of Wisconsin-Madison School of Nursing, 2004 – 2014. Led $20 million campaign to construct a new nursing sciences center (Signe Skott Cooper Hall).
“Money can’t buy you love.”

The Beatles

“I can’t get no, satisfaction. But I try, and I try, and I try.....”

The Rolling Stones
Happiness vs. Joy: Example

Happiness
• In the midst of life’s ups and downs happiness is still present.

Joy
• Serving others, sometimes through sacrifice with no possible personal gain. Witnessing justice for the less fortunate. Feeling close to a god.

Source: Difference.com
Happiness vs. Joy: Emotion

Happiness
• Outward expression of elation

Joy
• Inward peace and contentment
Happiness vs. Joy: Causes

**Happiness**
- Earthly experiences, material objects

**Joy**
- Spiritual experiences, caring for others, gratitude, thankfulness
Happiness vs. Joy: Time Frame

**Happiness**
- Temporary, based on outward circumstances

**Joy**
- Lasting, based on inward circumstances
Happiness vs. Joy: Life

Happiness
• Happiness can be experienced from any good activity, food or company.

Joy
• Joy is a byproduct of a moral lifestyle.
Today’s Objectives

• Appreciate the “joy” of giving to overcome any negative perceptions related to fundraising.

• Learn how to identify potential donors by identifying people’s passions.

• Be comfortable initiating a conversation on giving.

• Learn how to use the fundraising toolkit for action coalitions.
Understanding yourself .... And your donors
Winner Winner Chicken Dinner!

- You just won $100 million.
- What do you want to accomplish with your money that would be meaningful to you?
The Tool Kit

- Core Pillars & Premises
- The Case for Support
- Relationship Management
A Framework for Fundraising Success

Fundraising Strategy
- What level of philanthropic support do we need to raise and for what purposes?
- What level of philanthropic support is feasible to raise?
- What activities and investments are necessary to reach that goal?

Donor Engagement
- What are the most effective ways to identify and engage new prospects?
- What activities will motivate continued and upgraded gifts from current supporters?

Case for Support
- What aspects of our work and vision will inspire the greatest philanthropic support and have the greatest impact on our mission?
- How will we communicate our goals and vision most effectively to different constituencies?

Leadership
- Which volunteer(s) or group will serve as the primary champions for fundraising for our cause?
- What is the most effective way to engage and support other volunteers in advancing our fundraising work?

Internal Operations
- What (if any) staffing will be necessary to support our fundraising program?
- What systems do we need to have in place to organize and accurately track our work?
Core Premise – The Donor Pyramid

- PLANNED GIFTS
- CAPITAL / ENDOWMENT GIFTS
- MAJOR GIFTS
- MAJOR ANNUAL GIFTS
- RENEWED AND UPGRADED DONORS
- INITIAL DONORS
- ALL CONSTITUENTS

Donor moves up through EDUCATION, INVOLVEMENT and MORE PERSONAL SOLICITATION.
Relationship Management Cycle

Source: Campbell & Company
Donor Commitment Continuum

Ignorance  Awareness  Interest  Experience  Participation  Ownership

Source: Advancement Resources
Major Gift Prospects

**Experience**
- Seen/heard/felt results of work
- Know the people
- Believe in leadership
- Likely to contribute

**Participation**
- Attend activities and events
- Active volunteer, when asked
- Feel part of organization
- May contribute major gifts/special projects

**Ownership**
- Volunteer when see need
- Seek new ways to advance mission
- Organization mission part of my mission
- Organization receives mass majority of my philanthropy
<table>
<thead>
<tr>
<th>Experience</th>
<th>Participation</th>
<th>Ownership</th>
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<tbody>
<tr>
<td>Good job?</td>
<td>Do I feel valued?</td>
<td>Am I proud?</td>
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<tr>
<td>Approve of</td>
<td>Valuable?</td>
<td>Can I ensure work continues after I am gone?</td>
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<tr>
<td>methods?</td>
<td>Do I enjoy my</td>
<td>Do I want to leave a legacy?</td>
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<td>Believe in</td>
<td>association?</td>
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<td>leadership?</td>
<td>Can I give more?</td>
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Giving your $ away – Due Diligence

• Back to your $100 million.

• What would you want to see, know, hear before making a philanthropic investment in a philanthropic partner?

• Who do you need to have a relationship with to trust that this substantial gift will help make your dream come true.
# The Case For Support

## Core Question

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<thead>
<tr>
<th>Stage</th>
<th>Case for Support</th>
<th>Donor Messaging</th>
<th>Fundraising Communications</th>
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<td>Defining your rationale for support and opportunities for donors to give</td>
<td>Articulating your case in a compelling way</td>
<td>Sharing your message to motivate action</td>
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## Process

## Types of Products

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</table>
| Internal reference materials:  
  - Value proposition  
  - Giving opportunities  
  - Case outline | Internal reference materials:  
  - Messaging platform  
  - Talking points  
  - Case statement? (See below) | Communications strategy  
  External, donor-ready materials:  
  - Print: Brochure, appeal letter, grant proposal  
  - Digital: Website, video, social media, email, presentation |
Tailoring your Case – Both And
Who remembers this guy?
The Essence of Your Message

Why?

Why?

Why?

So What?
Donors give *thru* organizations not *to* organizations. They give to.....

• Make the world a better place
• Make a difference
• Leave a legacy
Vision – WOW Statement -- FOCUS

• **Far reaching** – Focus on what is possible rather than on what is
• **Optimistic** – Anticipate the best possible **outcome**
• **Compelling** – Offer something appealing that is not normally encountered or that only your institution can provide.
• **Unifying** – Align with institutional vision and illustrate a common mission among multiple endeavors
• **Societal** – Focus on how it will make a difference (solve problems, enhance life, etc.) for society, not the institution
Discovering Donor’s Passion
Searching for partners (aka “identifying Prospects”)

- Individual Donors: Major Gifts
- People give to people to help make the world a better place.
- The higher the contribution, the more personal contact needed.
- The larger the contribution, the longer the cultivation.
- Work with your organization’s development professionals.
Begin the Conversation

What are some signs that someone might share a passion for nursing?

How can you engage in conversation?

Share your passion – your elevator story – and ask if they’d like to learn more about how they can help through giving.

Collect contact information and ask if you can share with a development officer at your organization.
Questions/Discussion

Thanks to....

• Campbell & Company, Action Coalition Toolkit
• Askingmatters.com
• Advancement Resources: Art & Science of Donor Development
• UW Foundation/Don Gray