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BY MICHAEL J. MORSBERGER

I CAN HARDLY BELIEVE that this year marks my 30th anniversary in the field of fundraising. Ever since I fell into a development job right out of college with my newly minted journalism degree, fundraising is pretty much the only thing I've done. When I haven't been securing philanthropic gifts at work, I've been called into service at my church, the kids' schools, and countless other worthwhile charitable endeavors. I guess I'm a one-trick pony in that regard. And I've loved every minute of it.

What a privilege to come to know a Nobel Prize winner on a first-name basis and to be welcomed into the offices and homes of some of the most powerful and generous people on the planet. Playing matchmaker between a donor's desire to make a difference and an institution's aspiration to create change is thrilling. Could there be anything more satisfying?

Fundraising can also at times be heartbreaking, exasperating, counterintuitive, and consuming, but above all it's gratifying. Between you and me, here's some frank insight on less-discussed aspects of the profession.

eware of Gifts

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(and other stories I only tell my advancement friends)

Advice is a gateway to gifts.

Fundraising is a metric-driven and benchmarked profession, but I think the pendulum is beginning to swing too far toward the science and away from the art form. I believe development is a contact sport: The more contacts you make, the more money you raise. That said, getting to know your constituents means asking opened-ended questions rather than forcing a case for support down their throats. What were their experiences like at your school? What are their passions? What is your institution doing to solve a problem that touches their lives? What advice do they have for their alma mater?

As the new vice president at a previous institution, I reached out to an alumnus who was notoriously difficult to cultivate or solicit. A president, dean, and countless development officers had visited him to no avail over many years. On my first visit to his office, he said, “You’ve got 15 minutes.” I opened by saying, “I wonder if you can help me with a problem?” He sat up and leaned forward.

I described a curious dip in giving and engagement with alumni from specific years he attended college and in some specific majors. Immediately, he jumped in with insights not readily accessible in the research I had done. Part of the disengagement, he explained, could be related to anti-administration rhetoric during Vietnam-era campus protests. But, more profound, he said, was the firing of a beloved student adviser for unknown reasons. “That guy was everything to the students. I don’t think anyone

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knows how important student advising and career services are to the student body,” the alumnus said. “He helped us with internships and resume writing. He even taught me how to tie a tie.” A year after my visit, the alumnus made a six-figure gift to our student counseling programs and was being groomed for the board. Seeking our constituents’ advice helps them become engaged stakeholders.

You haven’t earned your stripes in development until you’ve turned down your first major gift.

This was an old joke among my colleagues at a prestigious university medical campus. However, this principle has served us well. A grateful patient I worked with was absolutely convinced by anecdotal evidence that antioxidants in green tea could cure prostate cancer. He offered a multimillion-dollar gift to explore the thesis. I raced to the cancer center director’s office to share the good news and set up an appointment for him to meet the prospect. The esteemed physician-scientist who ran the cancer center congratulated me on my hard work and enthusiasm. He said he would be happy to meet with the prospect but added, “Mike, just so you know, I will be turning the offer down.” I stood stunned.

He explained that while the research had merit, our institution was not the best-suited to run the study. In fact, a sister institution (read “the competition”) had just started a program in this area, and he would be happy to connect our prospect with that institution. My jaw remained on the floor. The center director then explained the reality of medical research. If he cleared a laboratory and hired new faculty for this research, he would not only displace other reputable scientific exploration in which the center had already invested but he would also likely burn through several million dollars of the gift within two years simply ramping up—then what?

When we met with the donor prospect, the center director listened carefully and then offered to make the introduction to the other institution. The prospect eventually gave several million dollars to the other program. A few months later, he also sent us an unrestricted check for \$500,000 with a note that read, “Integrity still holds meaning in this world. ... Thank you.”

Fortunately, I have not had to turn down a gift since, but how many of us have endowments that have gone unspent for years—for diseases that have been cured, areas of study that are no longer relevant, disciplines that no longer exist, or lectureships that no one attends? Beware of gifts that eat resources and time. We must not accept gifts that actually cost our institutions money.

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Make yourself vulnerable, but be prepared to get hurt along the way.

Have you ever stopped to consider how vulnerable donors are when they confide in you? They share their insights, feelings, goals, passions, and their wealth. Donors have flat out told me about their net worth, about family problems, about their business teetering on collapse. I've cried with donors. I've made a point of being vulnerable myself. I feel like 50 percent of me works for the institution I represent, and 50 percent of me works for my constituents. I want to be authentic. In the moment. Straightforward. I am a philanthropic adviser and facilitator of dreams. But here's the thing. With profound relationships sometimes come profound disappointments—and pain.

For several years, I was fortunate to work with a wealthy couple who had met as undergraduates on the campus where I worked. He made a fortune in technology and shared it with his large family and

throughout the community.

The couple was generous toward their alma mater and its medi-

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cal research. I grew close to them. In a tragic twist of fate, both were diagnosed with terminal disease later in life. They did what came natural to them and made an enormous philanthropic commitment to scientific research and patient care at their beloved university. They died within days of each other. What a love story.

A week later, I arrived at their church for the service to honor their lives. As I approached the vestry, the couple's son stepped forward. I had never met him or his siblings but delighted in the couple's stories about their children and grandchildren. I recognized him from the pictures on their walls.

I reached out my hand to introduce myself, and he said, "I know who you are. You are not welcome here. You stole my inheritance." I did not know what to say. He pointed to the parking lot. I obliged, returned to my car, and wept. I do not tell this story to illustrate some fault in the way I conducted myself professionally or to suggest that this couple's son was mean-spirited. I tell this story because the giving of money is to be handled with extreme nuance and immense sensitivity.

Invest yourself fully in the life of your institution.

Read the student newspaper. Take an admissions tour with prospective students. Drop by on freshman move-in day and carry a small fridge up a flight of stairs. Attend graduations. Audit a class or even consider attaining a new degree and becoming an alumnus. Take part in campus traditions. Attend sporting events and even faculty senate meetings. You cannot fully represent a school unless you know the school. And, for goodness' sake, be a donor. No exceptions or excuses.

Donors will see right through a hired gun. This profession requires more than just wearing a lapel pin or a tie with school colors. Own it.

I used to sit down in the cafeteria, and I'd buy dessert or coffee for students who would tell me about their college experience and where they came from. I encouraged them to share their hopes and dreams. (Wear your school identification so they know you're legit.) Talking with students is always uplifting. They are our most fundamental "product." They are what we give to the world! These kids are amazing, and I would learn so much about needs and opportunities at the school. For instance, I learned from a student that the reason he didn't participate in study abroad was the cost of airfare to the destination school. Huh? An \$800 roundtrip ticket to London kept this bright young person from studying overseas? I wanted to pull out my credit card and charge his flight right there, but the window had passed. I like to tell this story to alumni when they ask me, "What difference can my \$1,000 gift possibly make?"

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Beware of Gifts **THAT EAT**

The biggest secret to successful fundraising is that there is no secret.

I've been hearing a lot about crowd-funding from alumni and faculty who believe we are just one ice-bucket challenge or clever text message away from untold millions. I don't see that happening. Sure, some schools have experienced success with fundraising fads, but don't kid yourself into thinking it will outpace a major gifts strategy or even direct mail returns. Get out of the office. Engage your constituents. Pick up the phone. Cultivate meaningful relationships. Seek out true philanthropic partnership.

There is no single person, event, or communications tool that will "change the game" at your institution. You are a professional fundraiser. Focus on what works.

Regrettably, there are still a few well-meaning deans, headmasters, presidents, and board chairs who believe some of the following fallacies:

- If only we had an annual gala. (Don't get me started on this one.)
- If only we had a better website and online fundraising platform. (At most institutions, this still accounts for a small percentage of total giving.)

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MIKE'S MAXIMS: From turning down gifts to helping freshmen move in, Michael J. Morsberger has some unconventional yet tried-and-true advice for nurturing donor relationships, maintaining integrity, and dealing with disappointments.

- If only we had a golf tournament. (After calculating the staff hours dedicated to filling foursomes and selling raffle tickets, I've found that most of these events don't net a dime.)
- If we only had a full-color, 36-page case for support document or better yet, a custom campaign DVD to mail to every alumnus. (Do you know what these things cost to produce? And that targeted rather than mass distribution of collateral materials is more effective?)
- If we only caught the attention of Bill Gates, Oprah Winfrey, Warren Buffett, or some other billionaire. (A board member once handed me the Fortune 500 list of the richest people in the world and suggested I send a letter to each. It's ambitious and laudable to have 10 percent of your prospect portfolio be associated with long shots, but we have too many tools to measure prospect propensity and capacity to chase donors indiscriminately.)

Don't waste your time on this foolishness. There is no single person, event, or communications tool that will "change the game" at your institution. You are a professional fundraiser. Focus on what works.

The best stewardship can cost the price of a stamp.

I would be remiss if I didn't say a word or two about stewardship. It's the bedrock of a successful advancement program. Get the basics right, and send acknowledgements within 48 hours of a gift. If it's a big contribution, make sure your president sends a personal letter or makes a call of thanks.

Do you think the person who can buy anything really needs a ball cap, water bottle, or scarf with your logo emblazoned on it?

I'm all for annual stewardship events, gift clubs, and so forth, but don't go overboard with lapel pins and tchotchkes for your biggest donors. Do you think the person who can buy anything really needs a ball cap, water bottle, or scarf with your logo emblazoned on it?

A megadonor had received the university's highest honor at a fancy event. Hundreds of people attended, and the benefactor was presented with a marvelously crafted president's medal in a frame with a custom brass plate commemorating the day. A year or so later, I was at the benefactor's home. It had been raining, and he opened his hallway closet to offer a hanger for my raincoat. There, at the bottom of his closet, was the president's medal with a dozen other plaques and keepsakes. I pretended not to notice.

But here's what jumped out at me. As we entered his expansive living room, I noticed on his mantle a handwritten card I had sent the benefactor months prior. Simple, personal gestures go a long way.

I cannot underscore enough the power of handwritten notes. Philanthropy is more a matter of the heart than of the brain. Handwriting denotes caring and attention. Email denotes that a gift is a transaction.

Let me close with the words of a nun I came to know. Early in my career I was privileged to volunteer on a fundraising effort to build a soup kitchen, which an order of religious women ran. The priest at my church asked if I might lend a hand with their advancement strategy, which turned out to be rewarding. At the kitchen's opening event, Sister Mary made extensive comments of gratitude for my hard work on the project. It embarrassed me. Fifty volunteers in aprons were about to serve hot meals to the homeless, and she's talking about what I did. After the event, I thanked her but explained that I was uncomfortable with the accolades and that it was she who did God's work.

She looked me straight in the eye (all 4 feet of her) and said, "Young man, I want you to remember something: No margin, no mission." I've never forgotten that lesson.

In the end, folks, it's not about the money. It's about what the money can do. This profession is a calling. Blessed are those who call themselves advancement officers. Every day we are empowered with the ability to change lives. Our students, our faculty, our volunteers, our communities, and our colleagues are counting on us. ■

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