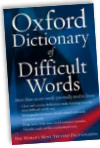


PHILANTHROPIC CREATIVITY FOR ANESTHESIOLOGY DEPARTMENTS		SAAAPM Annual Meeting November 4, 2017
Jim Boyle Vice President	Aaron Conley Senior Vice President	Grenzbach Giler and Associates 200 S. Michigan Avenue Suite 2100 Chicago, Illinois 60604 tel 312.372.4040
		GG+A

Understanding Philanthropy and Donor Motivation

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION



#1 – Fundraising ...asking for a gift

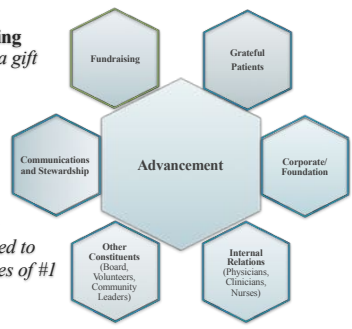
#2 – Development / Advancement ...everything needed to improve the chances of #1

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

#1 – Fundraising ...asking for a gift


#2 – Advancement ...everything needed to improve the chances of #1



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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

If you're new to fundraising, donors think differently about...



<p>Annual Gifts</p> <p>Transactional</p> <ul style="list-style-type: none"> Routine or little thought given <p>Impulsive</p> <ul style="list-style-type: none"> Response to disaster/crisis <p>Impersonal</p> <ul style="list-style-type: none"> May not know anyone <p>Collective</p> <ul style="list-style-type: none"> Crowdfunding/social media 	<p>Major Gifts</p> <p>Well-Thought</p> <ul style="list-style-type: none"> How do I feel about this organization? <p>Contemplative</p> <ul style="list-style-type: none"> Exploration of long-term impact <p>Highly Personal</p> <ul style="list-style-type: none"> Close relationship(s) <p>Individual Impact</p> <ul style="list-style-type: none"> Single purpose/project
--	--

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CREATIVITY: THE NEXT ICE BUCKET CHALLENGE?

Duke Anesthesiology
Duke University School of Medicine

Pie-in-the-Face Global Health Fundraiser

On November 16th, Anesth. Chair of the Department of Anesthesiology, Dr. Joseph Mathew, graciously accepted a pie in the face for being the "winner" of the Department of Anesthesiology's first annual Pie-in-the-Face Global Health Fundraiser to support recent fund-raising efforts to help Global Health Projects.

This year's fundraiser gave people within the department the opportunity to donate money towards Dr. Anamaria Thompson, Dr. Mark Siffelstadt, Dr. D. Adelman. The person who received the most donations in this week would receive the celebratory pie. Dr. Eddie Sanders from Duke Regional Hospital had the honor of throwing the pie as a result of donating the largest amount of money.

Images by Matthew Weisberg (1/26/17) received here and being the official winner, Dr. Siffelstadt, with \$207.42, and Dr. Thompson, with \$181.46, were not safe from the flying pie. Dr. Adelman's Global Health Fundraiser Dr. Thompson with a pie in the face, and Dr. Siffelstadt threw pie to Dr. Mathew coming with a surprise pie delivery. Please enjoy photos taken from the event, and we look forward to next year's fundraiser!



Source: anesthesiology.duke.edu/?p=330119

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

Inclination, Obligation, and Association
 What We Know and What We Need to Learn about Donor Motivation
 Paul G. Schervish, PhD
 Iowa College

This chapter reviews the same questions surrounding the best practices for charitable gifts of money and assets—what is the best financial philosophy for the donor? I take up the relationship between the donor and the recipient, the donor's motivation, the donor's goals, and the donor's expectations. Because the donor's motivation, goals, and expectations that guide their charitable giving—what I like to call an *identification model*—are the same factors that are influencing an organization's fundraising strategy, the donor's motivation and expectations can lead to giving and increased giving. It is always necessary to have a solid relationship in the "system" of giving, or we are spending about as much as we are getting. Therefore, in exploring the relationship between these factors and philanthropy, it is important to understand how these factors interact and how they can be leveraged to increase their giving. In all instances, the *identification model* of our approach to charitable giving is represented by *communities of participation* and *frameworks of consciousness*. The *identification model* is more than a theoretical model; it is a practical tool for the donor and the recipient. I have submitted my view of the *identification model* to various groups (Schervish & Schervish, 1996; Schervish, 1998, 1999) and find it well-received in a practical fashion by many (1996) and (1999) and I am confident that my fellow case for the theoretical and practical importance of the *identification model* over the *identification model* in the last chapter of my book *The Wisdom of the Philanthropist* (Schervish, forthcoming). Both an individual

- Identification Model
 - Communities of Participation
 - Frameworks of Consciousness

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

1. Think of one of your top prospects who has not yet made a major gift.
2. Identify their...
 - + Engagement Driver(s) (Communities of Participation)
 - + Emotional Driver(s) (Frameworks of Consciousness)
3. How will these guide your solicitation strategy?

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TOOLS FOR EMOTIONAL AND ENGAGEMENT DRIVERS

- **One-on-one initial visits** by development professionals, eventually accompanied by relevant institutional or volunteer partners
- Systematic, **personal communications** that are natural follow-ups to conversations, providing "insider" information about areas of interest or on topics of interest to the prospective donor ("I saw this and it reminded me of our conversation about...")
- Broader, **public communications** such as alumni magazines, school or department newsletters, annual reports and similar vehicles that consistently include information about gifts received, donor profiles, campaign updates and similar news that helps build a greater institutional "philanthropic identity"
- **Events or topical programming** that feature institutional partners, volunteers, and/or include other prospective donors at similar levels
- Invitations to participate in appropriate levels of **volunteer activities**
- Invitations to **off-site briefing meetings** led by institutional leadership, designed to elicit feedback in small groups

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

THE 2016 U.S. TRUST STUDY OF High Net Worth Philanthropy
 SOLICITING PRACTICES AND FUNDRAISING REALITY
 U.S. TRUST | IUPUI

- Available at: philanthropy.iupui.edu/research/current-research
- Conducted in 2006, 2008, 2010, 2012, 2014, 2016
- Criteria include:
 - Minimum household income of \$200,000 and/or net worth of \$1 million (excl. home)
 - 1,435 study participants
 - Average income \$331,156 and net worth \$16.8 million.

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

Please check the top three challenges to your charitable giving.

FIGURE 10
 CHALLENGES TO HIGH NET WORTH DONORS' CHARITABLE GIVING

Identifying what I care about and deciding what to donate to	67.3%
Understanding how much I can afford to give	49.8%
Allocating time to volunteer/get more involved in the organization I care about	45.3%
Monitoring giving to ensure it has its intended impact	37.4%
Structuring gifts in a tax-efficient manner	21.7%
Managing my giving with someone else	19.1%
Identifying an advisor that understands my goals and priorities	3.2%

- High net worth individuals admit their top challenge...
 How do I decide what to support?

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UNDERSTANDING PHILANTHROPY & DONOR MOTIVATION

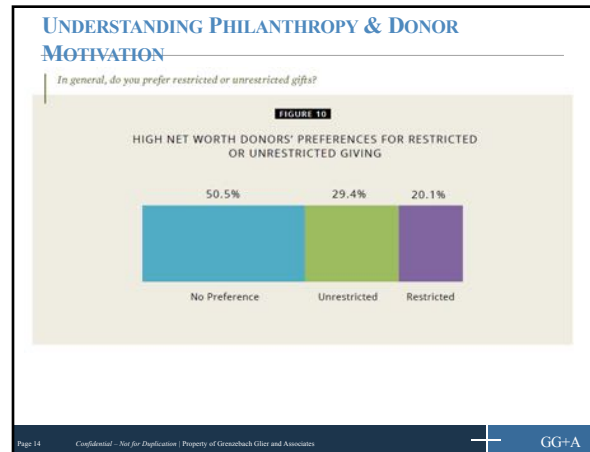
There are many non-profits you could choose to support. When considering the causes/organizations you give to today or would be likely to give to in the future, what led or would lead you to give to those causes/organizations over others?

FIGURE 11
 HOW HIGH NET WORTH DONORS CHOOSE A CAUSE OR ORGANIZATION TO SUPPORT

My values	78.3%
Interest in the issue area	64.2%
Firsthand experience	55.1%
Recognizable or reputable non-profit	51.0%
Perceived need of the organization/issue area	50.0%
Non-profit report rankings	20.4%
Association with another institution	20.3%
Social circle endorsement or pressure	8.8%
Compelling pitch, either in person or via collateral	6.4%

- Importance of beliefs, values and interests...
 "The Ask" is less important than getting to Donor Readiness

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Raising Philanthropic Support for your Anesthesiology Department

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- ### HOW DO I GET STARTED?
1. **Case** – What do I need? Your vision/Strategic Plan
 2. **Prospects** – Who are my potential donors?
 3. **Plan** – How do I engage my donors?
 - Individualized/specific to each person
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- ### USING YOUR STRATEGIC PLAN IN PRIORITY SETTING
- **Critical Points** in Communicating Your Priorities to Donors
 - **Brevity:** Challenge yourself to articulate your plan as if it was a text message.
 - **Focus:** Decide what are the two or three most important priorities in your plan?
 - **Outcomes:** How will your department/unit be better if this plan is executed?
 - **Appearance:** Academic writing doesn't work outside of academe.
 - **Messengers:** Who is carrying your message? Can your volunteers, development staff and other non-medical staff effectively translate your plan?
-
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- ### GRATEFUL PATIENTS – MINE ARE ALL PASSED OUT!
- **Make fundraising a team sport** – involve physicians, nurses, receptionists, family service coordinators and anyone who interacts with patients. Build a common vision and goal.
 - **Educate, Educate, Educate** – outreach to the community, service clubs, 'lunch and learns', and the larger medical community on the role anesthesiology plays in exceptional patient care. Don't forget about the clinic or hospital.
 - **Listen** – donor clues can be subtle and they may not be aware of their interest.
 - **Develop an Advisory Board** – people who volunteer their time give more and can serve as Ambassadors.
 - **Donate** – set an example for your team, your patients and your community.
-
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WHAT COULD POSSIBLY GO WRONG?

More about "what we need"	Assume emotional commitment that's not there
Decide for them what their interest "should" be	Emphasize recognition and reward when it doesn't matter
Focus on size rather than impact of the gift	Evidence of fear, negativity or desperation



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PARTING ADVICE

Do your homework, know your facts, but it is passion that matters...

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Our mission is advancing yours.

GG+A

Thank You and Best Wishes for Fundraising Success

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