

At nonprofits, participating in fundraising becomes part of the job

By Sacha Pfeiffer, Globe Staff

Sacha Pfeiffer of The Boston Globe interviewed Roger Sametz and a range of Sametz Blackstone clients around how they and Sametz Blackstone are collaborating to increase philanthropic giving in a very competitive environment.

When Gina Purtell became director of Mass Audubon's Allens Pond Wildlife Sanctuary in Dartmouth, it seemed like her dream job. She envisioned spending her days clearing woods, building trails, and counting birds at the property's 1,000 acres of salt marsh, coastal oak woodlands, and grasslands.

But she didn't realize that she was also expected to beg patrons for cash.

At first, soliciting donors "definitely felt uncomfortable, and I was very hesitant and resistant, even resentful," Purtell said. "I was like, 'That's not my job!'"

With competition for donor dollars growing ever stiffer, many nonprofit organizations no longer consider fundraising and marketing the exclusive realms of development officers. As groups search for more creative ways to raise money, they are often turning to other members of their staffs to help pass the hat. This

approach widens the circle of fund-raisers and, several nonprofits say, helps add to their coffers.

From Boston Symphony Orchestra musicians who attend small-group dinners with elite donors, to MIT scientists who invite philanthropists into their labs, to Massachusetts Audubon Society field staff who ask for donations wearing hip boots and sun hats, the people who do "the ask"

said Susannah Lund, a spokeswoman for Mass Audubon, which has engaged Sametz Blackstone Associates to both develop campaign messages and materials and help to train its 20 sanctuary directors and some of its science and program staff. "We're all trying to make connections with the public and encourage them to volunteer and get engaged in our work—and some of those people will go on to support us financially, as well."

"Nonprofits are recognizing that if their fundraising campaigns are going to be successful, they need to enlist their staff and volunteer leadership as ambassadors and make them part of a wider development team," says Roger Sametz, president of Sametz Blackstone Associates.

may no longer have the title "fund-raiser" on their business cards. While hospitals, universities, and other nonprofits have long relied on their top executives, deans, and prominent faculty to cultivate prospective donors and aggressively raise money, a growing number of nonprofits are tapping front-line staff members, too.

"There's much more of an understanding across the organization that we're all fund-raisers and marketers,"

Even Purtell has grown to believe that her daily contact with sanctuary visitors makes her uniquely suited to ask them to contribute money and volunteer time to programs such as constructing osprey platforms and building nature boardwalks. She also realizes that some wealthy patrons are eager to put their fortunes to good use and that any money she helps raise specifically benefits the Dartmouth sanctuary.

“If I want the resources and I want to expand what we do, that means getting more money—and asking people for money doesn’t have to be scary if I do it in my own way, even if it isn’t a grandiose or polished approach,” said Purtell, 41, who has increased individual annual donations to the sanctuary from about \$11,000 to nearly \$38,000 since she became director six years ago.

To cultivate prospective donors, Purtell may invite them to do volunteer field work at the sanctuary, such as pulling weeds. Then, if she can summon the courage to ask for a contribution, she might mention she’s trying to reach a fund-raising goal but explain she feels awkward asking for money. “I’m very comfortable admitting to them my lack of experience,” Purtell said. This approach, she added, seems to work.

“As the public faces of their organizations, staffers are particularly well-positioned to identify prospective givers, build long-term relationships with them, and give them a hands-on view of the nonprofit’s mission, whether by explaining the implications of their scientific studies or educating them about wildlife conservation,” says Roger Sametz, president of Sametz Blackstone Associates, a Boston-based strategic communication firm that helps a range of nonprofit organizations to increase both earned and contributed income. “After all, staff members often do the work that stirs donors’ passions, such as conducting cancer research, keeping the Charles River clean, or playing the violin. By developing long-lasting connections with potential contributors, staff may grow comfortable enough to ask them to donate. Nonprofits also look to their staffs to recruit volunteers whose time can be as valuable as their checkbooks.”

“Nonprofits are recognizing that if their fund-raising campaigns are going to be successful, they need to turn these kinds of people into ambassadors and make them part of their development team,” continues

The players tell their personal stories and answer donors’ questions, creating what the symphony’s development staff hopes will be a more intimate bond between contributors and musicians. The dinners are “just extraordinary,

“People who make major gifts are not just good doobies,” according to Roger Sametz. “They’re looking to invest in organizations through which they can realize shared goals—a common vision. Often a person who does not have ‘development’ on his or her business card—a scientist, musician, sanctuary director—can move a prospective donor closer to an organization and be ‘proof’ that one’s philanthropic dollars can make a real difference.”

Sametz. “You have to try to create a culture where people understand that what’s in their job description isn’t necessarily enough to advance the organization, and that helping raise money is good for both their organization and their own goals and personal growth.”

That’s especially the case at small organizations with tiny development staffs—or no development staffs at all—and at large organizations whose operations are spread across the state. The Boston Symphony Orchestra, for example, hosts seven pre-concert dinners each season where small groups of elite donors who contribute at least \$2,500 annually share a meal with one or two select musicians in a private room at Symphony Hall. Jeffrey Marshall, a BSO donor and member of the symphony’s board of overseers who attended all of last season’s dinners, said one of the most memorable featured two BSO players who are married, timpanist Timothy Genis and violist Cathy Basrak.

and you don’t really see them as fund-raising,” said Marshall, a Boston retiree. “It’s a way of participating and thanking the orchestra and sharing your love of music . . . and it’s a good formula for orchestras to build audiences and bring people in and help to raise money.”

The dinners, Marshall added, have not only spurred him to increase his giving—he declined to disclose a dollar amount—but to volunteer to call other people and urge them to renew their memberships or give more generously.

“Of course,” says Sametz, “development officers still play a critical role in the fund-raising process, often by matching key staffers with prospective donors.” For instance, the development staff at MIT’s McGovern Institute for Brain Research routinely connects members of the institute’s Leadership Board, a select group of affluent business people, with McGovern scientists.

One of those connections resulted in a friendship between board member Thomas F. Peterson Jr., a wealthy entrepreneur and MIT graduate, and neuroscientist Christopher Moore—as well as in a \$500,000 gift by Peterson to support Moore’s work. In the past two years, similar relationships have resulted in an additional \$1.5 million in donations by Leadership Board members to support the research of individual scientists, said Laurie Ledeen, McGovern’s development officer.

“Fund-raisers come and go,” Ledeen said, “but you also have tenured faculty and renowned scientists who can establish long-term relationships with donors, and those are the people donors at very high levels want to have access to and be associated with.”

Nonprofits say they do not pressure nondevelopment staff to make the formal request for money if they feel uneasy doing so.

“They’re not charged with being heavy-hitter sales persons,” said Sametz, “and they’re not going to be making ‘asks’ unless they feel comfortable doing that. But engaging staff and volunteers—building a corps of informed, comfortable ambassadors—will always benefit an organization.”

In Purtell’s case, if she has developed a strong relationship with a potential donor but feels awkward asking for a contribution, she has a tactic for reaching the next step: After promoting a worthy Audubon program to a prospective contributor, she then relies on a development officer to make the formal request for money. Sometimes, she will attend meetings where a development officer asks a potential donor for a contribution, since her presence can provide a sense of familiarity.

“I’m getting better at it,” said Purtell, “and I understand that people put their money where their heart is, so if someone is showing me they have the heart, it’s not too much for me to ask them to put their money there, too.”



About Sametz Blackstone Associates

Sametz Blackstone Associates, founded in 1979, is a Boston-based, brand-focused strategic communications practice that helps leading academic, cultural, corporate, professional service, and government organizations to better navigate change.

The firm has years of experience helping both start-ups and centenarians to articulate their vision and value, and to build and nurture relationships with groups critical to an organization’s success. Through strategic consulting and message development; the creation and production of integrated print, digital, environmental, communications; supporting and improving internal and interpersonal communications; and by transferring knowledge and tools to clients so that they can fully own their communications systems and engage their organizations, Sametz Blackstone helps clients to realize both their strategic and tactical goals. The firm collaborates to help organizations build or re-energize brands, promote products and services, recruit and retain the best and the brightest, raise philanthropic dollars, build membership and participation, strengthen their competitive position—and add value to the enterprise over the short and long term.

Located in Boston’s historic South End in a 150-year-old brownstone, Sametz Blackstone works with clients around the corner and around the world.

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Compelling communications—integrating brand-focused strategy, design, and technology to help evolving organizations navigate change

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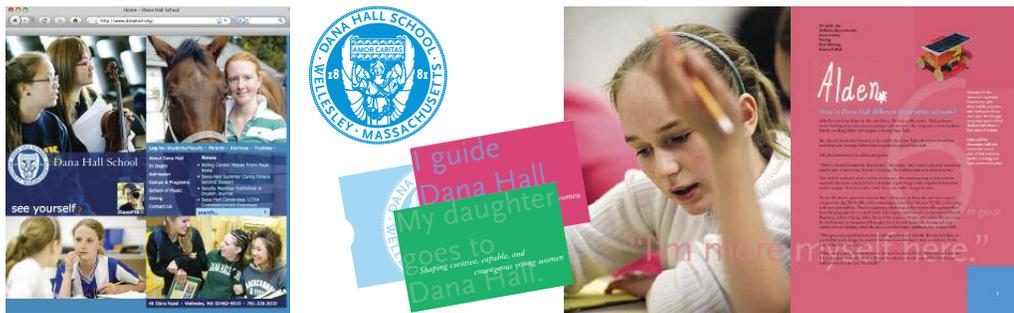
Brand-focused communications increase meaning and connection externally and internally—and help raise funds and build relationships



Providing different resonant “ways in” for donors: Boston Symphony Orchestra, Inc. The recently re-imagined annual report acknowledges the many donors who support the organization and demonstrates the different ways donors can connect and have impact. BSO, Tanglewood, and Pops chapters reinforce the value of these important brands.



Building a case for shared investment based on shared values: Mass Audubon. Print, digital, and interpersonal communications advance a comprehensive campaign by helping all those associated with the organization to tell Mass Audubon’s story compellingly—in ways that reflect the different ways donors and prospects count on—and value—the organization.



Developing a corps of informed, comfortable brand ambassadors: Dana Hall School. Evolved through an inclusive, cross-campus process, new brand-building communications articulate the school’s strengths, character, and value; build connections with people whose interest and participation are important for ongoing success; and provide the messages and materials to develop a corps of advocates and supporters.



Advancing dialogues and relationships: Harvard Medical School. A new system of messages and materials provides different “tours” for donors and prospects; gives development officers a framework and tools to initiate and advance conversations; builds comprehension of this complex organization; and helps align donor passions with institutional priorities.



Involving donors in a journey: McGovern Institute for Brain Research at MIT. From the outset, recognizable, distinctively-branded, print and digital communications helped establish this innovative institute’s position within the MIT and global research communities. Materials offer different, appropriate handshakes to scientists, foundations, and donors.