

Making the case and beating the odds

Big bucks for capital campaigns

By Claudia Zorn

“To get to the level of commitment needed to attract major gifts,” explained Roger Sametz, “organizations need a deep connection with donors and prospects at both the personal and institutional levels—and need to convince them that their organization is an investment through which they can realize their (ideally, shared) vision.”

Claudia Zorn of The NonProfit Times sat down with Roger Sametz to discuss what it takes to raise major dollars in the current environment—and to understand how communications can help organizations to achieve their goals. Two Sametz Blackstone clients—Whitehead Institute and Mass Audubon—are featured.

“It’s hard to point to one strategy or tactic and say that’s what brings in major dollars,” said Roger Sametz, president of Sametz Blackstone Associates, a Boston-based, brand-focused communication practice that provides strategy and integrated communications for capital campaigns. “People will give \$50 in response to something that lands on their kitchen table but not \$50,000. To get to that level of commitment, organizations need a deep connection with donors and prospects at both the personal and institutional levels and need to convince them that their organization is the best investment through which they can realize their (ideally shared) vision.

Whitehead Institute for Biomedical Research

The Whitehead Institute for Biomedical Research is less than one year into the quiet phase of a \$100-million Stem Cell and Regenerative Biology Initiative, \$40 million of which is to come from private philanthropy.

Businessman and philanthropist Edwin C. “Jack” Whitehead provided \$35 million to construct and equip a new building, \$5 million per year in guaranteed income and a substantial endowment in his will for a total gift of \$135 million.

Whitehead’s gift for a strong launch and healthy cushion did not anticipate that funding for embryonic stem cell research would be cut off by the Bush Administration, forcing Cambridge, Mass.-based Whitehead and other

similar institutions to scramble for private dollars after having depended largely on government support.

Making up for the gap in federal funding is just one bucket to fill. There’s also the cost of today’s more collaborative and cross-disciplinary research. And, there’s the ironic result of Whitehead still receiving some federal funding: the cost of its stem cell research is actually made more expensive since federal funding requires that separate facilities be maintained for those stem cell research projects not funded by the National Institutes of Health (NIH).

Because of its initial endowment and government funding, Whitehead also has to overcome the notion that they have enough money. “Working with mouse cells and human embryonic stem cells is expensive. It costs \$100,000 per year for special serum to feed the stem cells, and the purchase and care of mice for

just one of our investigators costs \$720,000 per year—that’s a lot of Swiss cheese,” said Patricia Denn, director of development at Whitehead.

“Raising funds for biomedical research organizations isn’t the same as raising funds for a hospital or medical institution. You don’t have grateful patients,” said Denn. “We need to find donors who can become passionate about the potential outcomes of this research.”

“A strong brand and brand-focused communications,” according to Sametz, “can get your messages out in a way that your Rolodex can’t. If your meaning and value are well-known, a conversation starts at square two rather than square zero.”

Since this is basic research, we need to convey that a donor’s investment will not just benefit Whitehead, but help create advances at hospitals, medical schools, and research institutions the world over.”

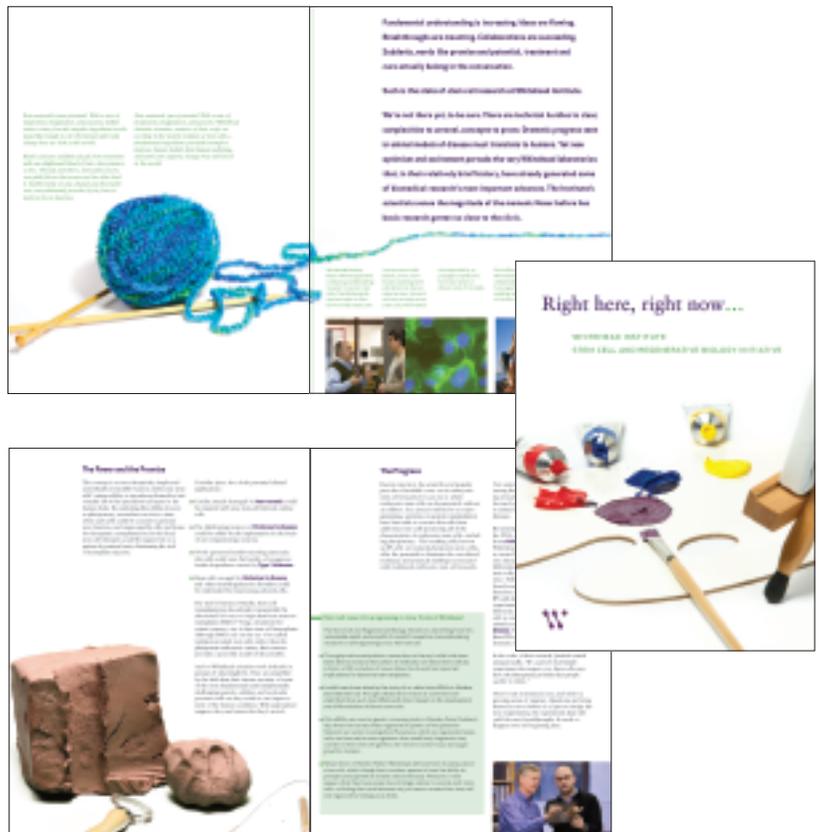
“One of the challenges is to present basic research as urgent and compelling,” said Sametz, whose team worked with Whitehead to produce a case statement that uses metaphoric images, such as dabs of paint, paint tubes, a brush and a blank canvas; a ball of yarn and needles; and a block of clay with sculpting tools to evoke the potential that stem cell research has to address the worst diseases that plague mankind.

stewardship, we’ve been able to connect with our donors. We might not be as successful if we were a huge medical center.”

Denn recently received a bequest from someone with whom the Institution had no previous contact. Whitehead was one of seven beneficiaries of a \$1 million estate from the donor. None of the other beneficiaries were related to Whitehead.

The unexpected gift, said Sametz, speaks to the importance of brand-building for fundraising. “A strong brand and brand-focused communications can get your messages out in a way that your Rolodex can’t. If your meaning and value are well known, a conversation starts at square two rather than square zero,” he said. “Donors and prospects will take calls because they’ve heard of you and want to be associated with you. This is particularly important in tight economic times. A strong reputation decreases risk people might feel and encourages investment.”

Though early into the campaign, Whitehead’s donors are “hugely intrigued,” said Denn. “Because of the size of our organization and the intimacy of the place and excellent



Campaign materials underscore the pluripotency of stem cells: paint squeezed onto a palette can be transformed into countless different finished paintings; the same ball of yarn can be fashioned into a sweater, scarf, or blanket; the possibilities for a block of clay are only limited by imagination. A second level of photography connects Whitehead researchers and their science to beneficiaries of stem cell research —each discoverers in their own right.

Mass Audubon

Educating donors to better understand their investment is one of the many strategies involved in Mass Audubon’s first comprehensive campaign since founding in 1896.

A relatively new concept, a comprehensive campaign rolls an organization’s annual fund, planned giving, major giving, and other fundraising projects into one overall campaign. For organizations with separate development staff on each of these giving tracks, a comprehensive campaign could seem like the game Twister, as staff members sometimes find themselves in precarious positions.

Sondra Madison, campaign director at Mass Audubon, acknowledged that the level of coordination required for a comprehensive campaign could be a

launching,” said Madison. “It’s about knowing the importance of annual giving and not sacrificing this. It’s about telling these donors already

“From the outset,” says Sametz, “we knew that success would come from involving a wide range of people in a collaborative effort. So campaign materials and training were planned to help make sanctuary directors and trustees be the most effective ambassadors possible.”

challenge for some organizations, but it has not been a stumbling block for Mass Audubon.

connected with annual giving what a comprehensive campaign can do and how they can be part of a great project that will take us into the future—and they get it.”

“The level of difficulty in a comprehensive campaign is directly related to the planning you do prior to



Qualitative research informed message development—messages aimed at connecting individual passions to institutional priorities. Bipartite stories pair an “inside” voice with an “outside” one to prove the efficacy of Mass Audubon’s efforts—and position the organization as the best investment for donors who care about connecting people and nature. Materials include donors and beneficiaries *in* Mass Audubon’s story.

Hired specifically to run Mass Audubon's comprehensive campaign, Madison said that many organizations bring in staff to run a campaign without coordinating with other ongoing development activities.

"Because of the complexity and comprehensiveness of this campaign, the campaign staff needs to be integrated with staff handling other aspects of development to make this successful." Staff was brought on to also work with membership and annual giving.

While most people understand that unrestricted giving for operating expenses and funding for specific projects are both needed, a comprehensive campaign can be confusing for donors, acknowledged Madison. "It's easier for people to understand that their money is going toward one goal. A comprehensive campaign requires educating the donor." In addition to donor education, Mass Audubon is involving non-development staff in the campaign. "The sanctuary director is the person who has the closest relationship with the donor. They live, teach and make a community for Mass Audubon," said Madison. Training non-development staff in the cultivation of prospects and donors has been essential to the campaign.

"Getting sanctuary directors to be part of the campaign initiative has been instrumental in bringing in gifts," said Madison. While Mass Audubon has had success in landing named endowments, the organization just began to offer naming opportunities to endow sanctuary directorships, a tried-and-true strategy for academic and medical institutions. Of Mass Audubon's 45 wildlife sanctuaries, 22 have a sanctuary director and staff who run programs that are open to the public. Aside from the dollars raised during the quiet phase, the organization has witnessed growth in donor understanding, an increase in passion, and an increase in volunteering, said Madison.

When the public phase launches sometime in 2009, the organization will reach out to annual supporters, asking them to continue their annual support and buy into a special ask. "It's one ask, in proportion to what they can do. This is the right way to do it. To do it right, however, you do your homework first," said Madison.

About Sametz Blackstone Associates

Sametz Blackstone Associates is a brand-focused strategic communications practice that integrates strategy, message development, design, and technology to create compelling communication programs that help evolving organizations better navigate change.

Clients include academic and research institutions, life-science organizations, professional service firms, businesses, cultural organizations and other non-profits, and government agencies.

Founded in 1979, Sametz Blackstone has always approached communication and design as important tools to help organizations realize both their strategic and tactical goals.

The firm has years of experience helping organizations, both startups and centenarians, define and articulate their vision and value, and increase connection to key constituents. Sametz Blackstone helps clients build or re-energize brands, enter new markets or geographies, promote offerings, increase participation, generate earned and un-earned income, recruit and retain talent, 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 both around the corner and around the world.

Sametz Blackstone Associates

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

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Campaign materials connect print, digital, and interpersonal communications. A PowerPoint presentation, shown here, can be used by staff and board; it can be customized easily to best resonate with donors' interests.

