

# It starts...

...with **forgetting** your elevator speech: Making a powerful case for donor support **Tom Ahern**

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# Why Brown exceeded goal

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- we built up a sales force (cultural change from old fashioned college development folks to proactive fund raisers) ultimately with specific goals and an objective/subjective financial incentive plan

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- we had a great vision and plan from a great President Ruth Simmons
- discovery; we found alums that the university previously knew little about and researched them extensively

- bolder asks; yes, just ask for more \$ if you know they have it. It was a waste to ask an experienced wall street investment banker (alum) for example for a \$5k gift to the annual fund instead of the minimum \$10k leadership level

- we increased annual giving significantly; I believe doubled it during the campaign; and it is a sign of confidence in the leadership and institution

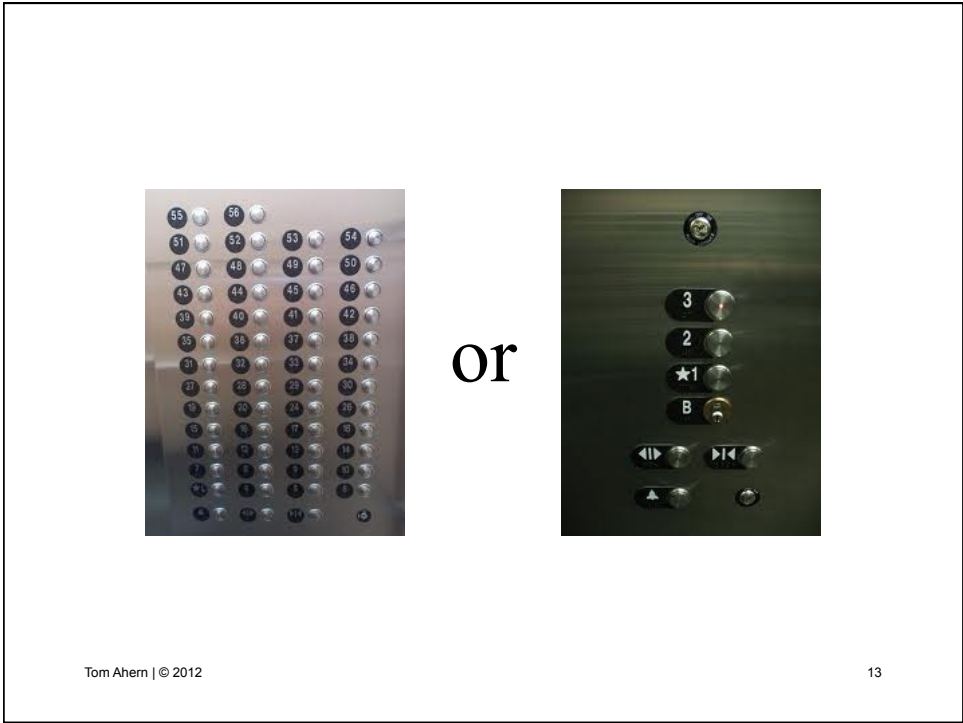
- we heavily marketed comprehensive asks to top donors very successfully ie an annual fund ask and endowment ask at the same time especially when in reunion years. I.e., “would you consider and annual fund pledge of \$5k per year for 5 years and a \$100k endowed scholarship over 5 years.”

- broad participation at all levels if I recall went up primarily based on challenges i.e., young donors, reunion givers, etc but in my opinion was not the driver

- the pyramid works and is getting more pointed than ever i.e., 90% + of the \$ come from 10% of the donors. it is romantic to focus on participation but in my opinion it will not get you the \$. Also, not necessarily true that young small donors build up over the years and then automatically become big donors or that older big donors started as small donors over the years. Our two biggest gifts came from old men who wanted legacy and made a lot of \$ and had not been consistent donors over the years. So yes, getting high potential donors to start with annual giving is good but go for the gold!

- as noted, research was key to estimate potential but individual contact determined inclination
- should check what stewardship and contact has been leading up to the campaign; many times on the road very early in the campaign we heard “I only hear from the university when you are raising money, and not in between”.

## Elevator speech: How long?



Elevator speech?  
Ride to nowhere.

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The best elevator pitch doesn't pitch your project. It pitches **the meeting** about your project.

Source: Seth Godin

I hope and trust my letter finds you well.

I am writing because I'd like to introduce you to something I've run across that is, I think, quite special ... and well suited to someone of your stature and vision.

Promise: I'll be blessedly brief.

*Then ...* if you are *at all* interested, after you've read my quick description of [charity name] ... I hope you will do me an additional honor, which is to take a meeting with me about this project.



[The simulator] allows you to practice removing a cataract and replacing it with a new lens ... just as if you were actually doing it ... with the very same feel! I tried it. It was addictive, I am embarrassed to say! If [charity name's] eye-surgery simulator were a game app, it would probably go viral.

I promised you I'd be brief.

So let me do the math quickly and let you go.

[Charity name] believes that, with its system, it can increase the annual number of eyesight surgeries among the poor worldwide to SIX TIMES the current rate ... and soon.

“Even when people perceive that flattery is insincere, that flattery can still leave a lasting and positive impression of the flatterer.”

Source: Neuromarketing blog

The best elevator pitch is true, stunning, brief and it leaves the listener eager (no, desperate) to hear the rest of it. It's **not a practiced, polished turd of prose** that pleases everyone on the board and your marketing team, it's a little fractal of the entire story, something real.

Source: Seth Godin

**Point #1**

There never *was* an elevator.

Point #2

Nobody wants your speech.

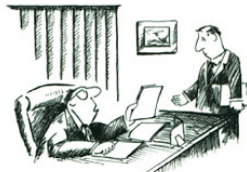
Point #3

Have conversations instead...

Point #4  
...that lead to experiences.

# MAKING THE CASE

THE NO-NONSENSE GUIDE TO WRITING  
THE PERFECT CASE STATEMENT



*"Your draft of the Case Statement has my basic thrust. Have it fleshed out, pretty'd-up, fussed over, given a shot of pizzazz, minimize the cost of the project, make the memorial opportunities sexier, shorten the headlines but add a lot more sizzle, get more exciting photos, cut the length, give me more details, find more inspiring quotations, get Board approval, and have it back tomorrow morning in final form."*

## JEROLD PANAS

You need a case for...

Capital campaigns

Direct mail

Email solicitations

... *any* kind of “ask.”

Your case is your  
answer...

...to a set of predictable questions. *That's all.*

The “God” Question?

*“Why in the world would I  
invest my hard-earned money  
in your stuff?”*

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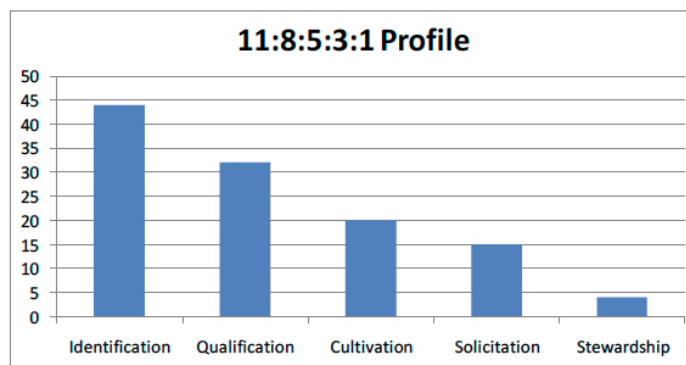
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*“What’s in it for me?”*

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## Prospect-to-Solicitation Ratio



GLOBAL  
PHILANTHROPIC

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Having a “natural constituency” answers at least  $3/4^{\text{ths}}$  of that question.

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Born 1942 | Age 71

America's largest donor to a university

First gift to Johns Hopkins: \$5 in 1965

Total giving: over \$1 billion

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Your best gift candidates  
haven't set foot on  
campus for 30 years.

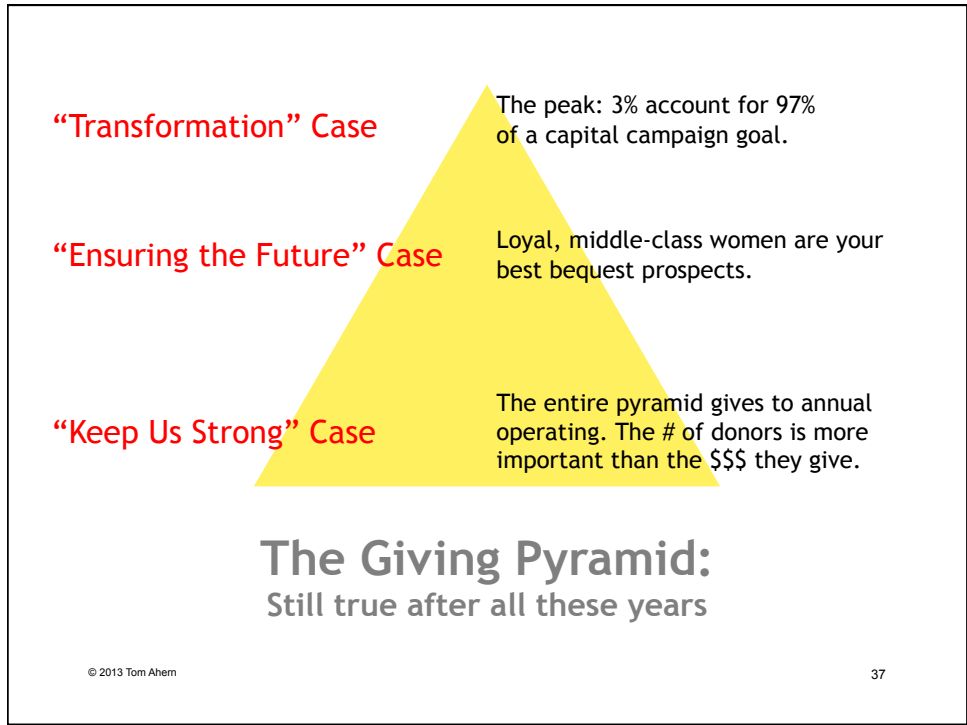
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Don't over-think your  
first draft case.

The "launch case" is the start of series  
of exploratory conversations.

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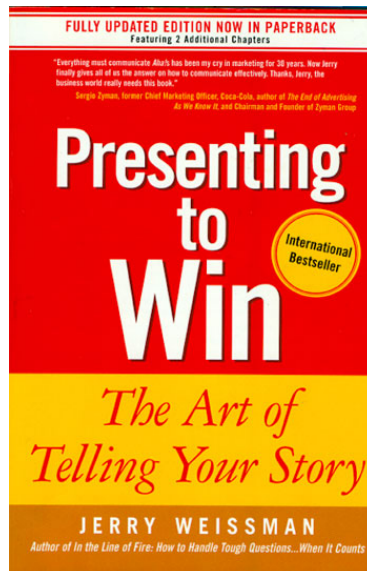
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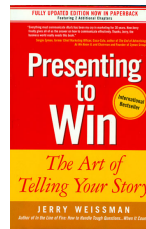
“Is 22 pages  
enough?”

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If you can't explain it in  
50 words, you won't  
explain it in 500 either.



“They mistakenly think that for the audience to understand *anything*, they have to be told *everything*. That’s like being asked the time and responding with complete instructions for building a clock.”



Source: Jerry Weissman

The Sierra Club and the end of global warming...  
Give us your help and seven years.

Dear citizen of planet Earth,

Human activity caused the problem of global warming.

And human activity *can* stop it.

As Nobel Peace Prize winner, Al Gore, says in the Oscar-winning documentary, *An Inconvenient Truth*, "We already know everything we need to know to effectively address this problem."

**30  
words**

**Insiders** 50,000 words of supporting info  
*became*  
2,500 word case document  
*became*  
weeks of heated debate  
*became*  
**Outsiders** “Academic excellence? I’m *for* that!”

Two words, as in:  
“better future”

Which become 6 words:  
“better future for  
women and girls”

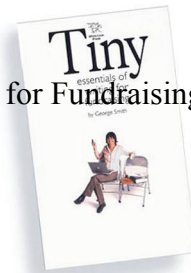
Which become 10 words:  
“better future for women  
and girls in Greater New  
Haven”

# Today's only assignment

Write *your* two words.

All fundraising copy should  
sound like someone talking.

-- George Smith, *Tiny Essentials of Writing for Fundraising*





1. Make it big.
2. Make it simple.
3. Make your donor the hero.

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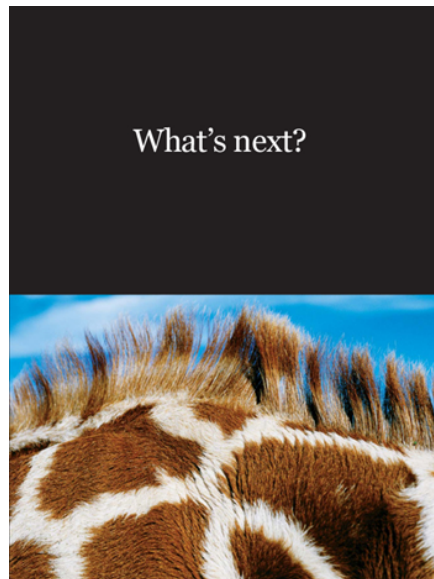
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1. Make it plain.
2. Make it corny.
3. Make it obvious.



Source: Jeff Brooks, The Fundraiser's Guide to Irresistible Communications

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What's next?

\$35 million raised



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Bigger. Faster. Better.

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**\$23 million raised**  
Bigger. Faster. Better.

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The right offer  
in front of the right people  
at the right time...

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# A case is an offer

*A great case is an offer laced with emotional triggers*

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National Breast Cancer Coalition  
The Breast Cancer Deadline  
2020  
Years Days Hours Minutes Seconds  
6 222 09 05 51  
Get On The Clock  
BREAST CANCER INFORMATION | ABOUT THE DEADLINE | GET INVOLVED | DONATE | ABOUT NBCC  
Donate to NBCC... a Breast Cancer Organization with a Plan. | NBCC Responds to the Angelina Jolie Story | SEE TODAY'S DEADLINE HEADLINES

Only a Few Days Left to Apply for the 2013 Project LEAD® Institute  
The deadline is this Friday, May 24!  
Apply Now

Watch this great TEDMed presentation by H. Shaw Warren, who spoke at our Inaugural Advocate Leadership Summit.  
Watch Now!

What Exactly is BRCA1 and BRCA2? My Story by Shira Sternberg  
NBCC Emerging Leader Shira Sternberg, a 30-year-old female Ashkenazi Jew, talks about what it means to her to be a BRCA1 or BRCA2 carrier in this compelling personal blog.

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In 1975,  
a woman had a **1 in 11** chance of developing  
invasive breast cancer in her lifetime.

59

Now, that risk has **RISEN** to **1 in 8**.

Not a misprint.

60

What was bad in 1975 has  
become **epidemic** in 2012.

61

# Fear!

62

Yes, pink ribbons abound.  
Awareness is near universal.

63

And yet the **death rate** from  
breast cancer has **scarcely**  
changed in 30 years.

64



Frustration!  
Anger!  
Disappointment!

65

Let's try a **different**  
approach.

66

Is **cure** the whole story?  
Let's give **prevention** a  
serious look for once.

67

A cure could take  
decades. **Prevention**  
could happen by 2020.

68

Hope!  
Promise!

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uninformed > understand  
dubious > believe  
resistant > act

Source: Jerry Weissman

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A campaign case talks  
about the **vision**, the  
**destination**, where you want  
to go **next and soon**.

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You're at A.

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# What's your B?

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“The gender revolution is not in a stall. It has hit a wall.”

The New York Times — Feb. 17, 2013

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**B**

But in Greater New Haven,  
**WE CAN**  
TEAR that WALL DOWN.  
We just need your help....

The Emergence of Stony Brook Campaign  
A Vision Book for Prospective Donors  
For more than 50 years, Stony Brook has set impossible goals... and met them.  
We invite you to help make the university's next half-century as exciting as the first.

Your gifts help  
Stony Brook answer  
today's most perilous  
question: *Can we save  
our environment?*

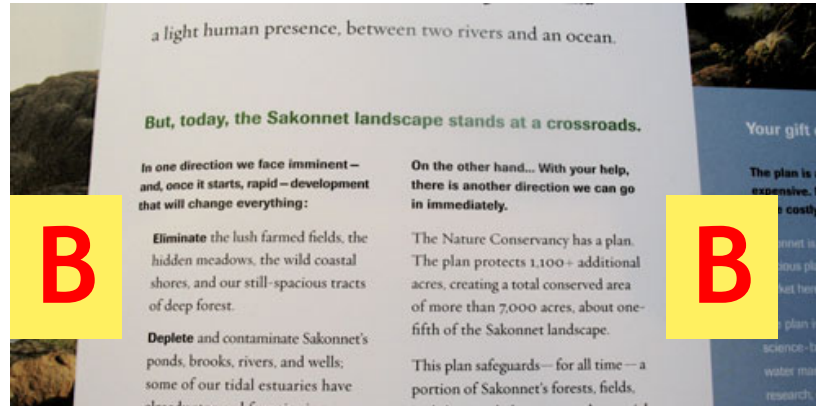
**Fear**

**Hope**

**A**

Stony Brook's Center for Wine, Food, and Culture is in Southampton (naturally). And our annual Southampton Writers Conference attracts A-list celebrities like Joyce Carol Oates, Amy Tan, and Frank McCourt. But most important is our new major in environmental studies (founded 2005), headquartered at the Southampton campus. Will our graduates save the world? Stay tuned.

**B**



## The “fork in the road” case

Thought for today....

Write drunk. Edit sober.

Writing to donors and prospects is NOT about them reading your stuff.

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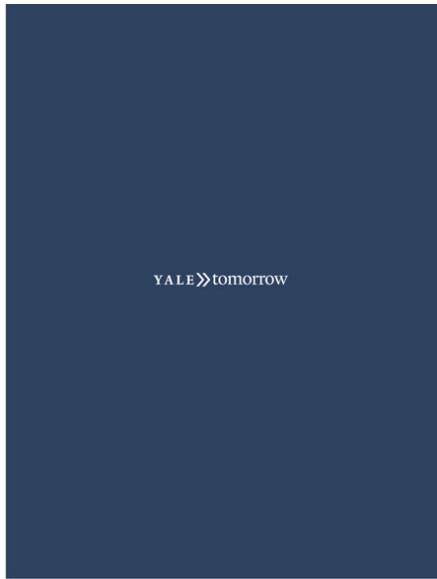
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It's about them **acting** on your org.s' behalf.

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Tomorrow, everything will be different

Directly addresses the reader

This Is Yale Tomorrow

Reveals the goal in 1st sentence

*A message from  
Yale President  
Richard C. Levin*

I invite you to participate in Yale Tomorrow, a five-year, \$3 billion campaign to build the future of our University. I seek your support to ensure that the accomplishment of recent years is not remembered merely as a bright moment in Yale's long history, but rather as the foundation for a Yale of permanently greater breadth and strength, a Yale with the capacity to contribute – by means of its scholarship and its graduates – not only to the nation but also to the world.

*The price of agility  
and excellence*

Even our most loyal supporters might wonder, after examining the spectacular performance of our Investments Office these past two decades, whether Yale needs to augment ~~philosophy~~ its already abundant financial resources. It is important to recognize that most of our existing endowment funds were given by donors of the past and present to be used for specifically designated purposes, thus, ~~most of our endowment~~ provides a strong foundation for ~~endowment~~ ~~of the endowment~~ a very small fraction of the endowment that is unrestricted permits only limited scope for innovation.

Fear  
Hope

But the work of building and sustaining a great institution is never done. To expand Yale beyond its current scale and scope, to build the Yale of tomorrow, we will need new financial resources. I hope that this statement will give you a sense of Yale's current vitality. And I encourage you to improve itself.

*Reinforcing our  
leadership*

This campaign will seek to enhance those Yale programs that are already among the nation's best. We will reinvestigate the Yale College curriculum, support graduate education, strengthen our libraries and museums, invest in the humanities and social sciences, deepen the Law School's involvement with international affairs and the legal profession, and augment the teaching and financial aid resources of our distinguished Schools of Art, Architecture, Drama, Music, Divinity, Nursing, and Forestry & Environmental Studies.

Subheads break up dense text

Fear

Vision

total words  
roughly 550

Navigation

Answers a leading  
skepticism immediately

Send to web

We will also seek to strengthen those programs that are vital to maintaining the University's overall standing in the twenty-first century. To remain among the world's great universities, we must invest in science and technology on an unprecedented scale. To keep our School of Medicine at the forefront, we need to translate advances in the biomedical sciences into improved clinical care. And to participate fully in the education of twenty-first-century leaders, we need the School of Management to take its place among the nation's top business schools.

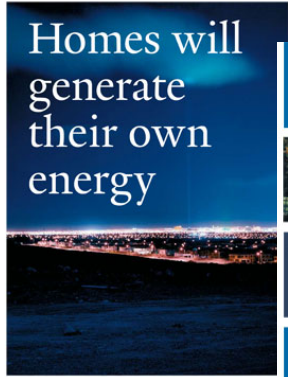
*Extending our reach*

Above all, we need to complete the transformation of Yale from a local or regional to a national to an international university. To prepare our students for leadership in an interdependent world, we need to augment the faculty resources devoted to international studies, and we need to make it possible for every undergraduate to have an overseas experience during his or her four years at Yale.

In the statement that follows, I highlight some of the most important objectives of the campaign under four headings:

*The College  
The Law  
The School  
The World*

In this format it is possible to mention only a fraction of the many opportunities available to prospective donors. This is a comprehensive, University-wide campaign, embracing all of the University's schools and programs. A complete listing of gift opportunities is available online at [www.givingonline.yale.edu](http://www.givingonline.yale.edu).



Living cells will provide a blueprint for nano-engines



Life expectancy will exceed one hundred years

Adults will be able to grow new teeth

Robotics will make long-distance surgery routine

Nanotechnology will make salt-water drinkable



Two Asian universities will rank among the top ten in the world

**Raised: US\$3.6 billion in gifts**

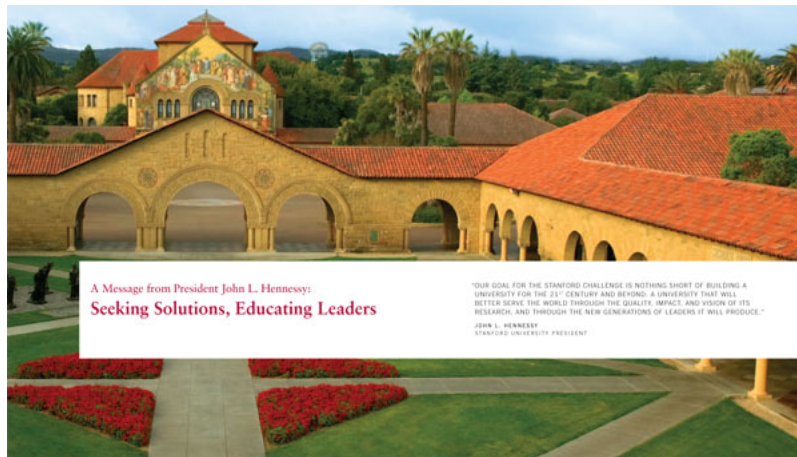
Two Asian universities will rank among the top ten in the world

**Fear, pride, desire, greed, ambition, and (yes) a dash of xenophobia**

### This is Yale Tomorrow

I invite you to participate in Yale Tomorrow, a five-year, \$3 billion campaign to build the future of our University [hope]. I seek your support to ensure that the accomplishment of recent years is not remembered merely as a bright moment [fear] in Yale's long history, but rather as the foundation for a Yale of permanently greater breadth and strength [greed], a Yale with the capacity to contribute —by means of its scholarship and its graduates not only to the nation but also to the world.

### What a \$6+ billion case looks like



The beloved place, as eye candy & reminder to natural constituency

Leadership, highly visible

The BHAG

A Message from President John L. Hennessy:  
**Seeking Solutions, Educating Leaders**

YOUR GOAL FOR THE STANFORD CHALLENGE IS NOTHING SHORT OF BUILDING A UNIVERSITY FOR THE 21<sup>ST</sup> CENTURY AND BEYOND: A UNIVERSITY THAT WILL BETTER SERVE THE WORLD THROUGH THE QUALITY, IMPACT AND VISION OF ITS RESEARCH, AND THROUGH THE NEW GENERATIONS OF LEADERS IT WILL PRODUCE.  
JOHN L. HENNESSY  
STANFORD UNIVERSITY PRESIDENT

The BHAG

**John Hennessy, President.** “Our goal for The Stanford Challenge is nothing short of building a university for the 21<sup>st</sup> century and beyond, a university that will better serve the world through the quality, impact, and vision of its research, and through the new generations of leaders it will produce.”

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# The BHAG

By 2030, with your help, [charity name] can eliminate cataract blindness as the prime contributor to poverty that it is today for millions of men, women, and children in the Americas, Asia, and Africa.

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# The BHAG

By [projected date], with your help [i.e. insert donor], [your charity name] can [do what wonderful, useful, worthwhile thing?]

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# The BHAG

“A true BHAG is clear and compelling, serves as unifying focal point of effort, and acts as a clear catalyst for team spirit. It has a clear finish line, so the organization can know when it has achieved the goal; people like to shoot for finish lines.” – James Collins, Jerry Porras, *Built to Last*

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# Today's *other* only assignment

Tomorrow, first thing, write your BHAG.

# Make it bigger



Source: Jerry Panass

"Democracy has to be born anew every generation, and education is its midwife." – John Dewey

# Who Needs Campus Compact?

Let's start with America.

Brackley College is one of 39 institutions of higher education that together make up the Illinois Campus Compact. From their modest beginnings in 1985, Campus Compact has expanded into a major national movement, with more than 150 member institutions and 11 state offices.



"We know that connecting studies with problem-solving service in the community deepens, complicates and challenges students' learning. They become citizen scholars who renew our democratic society..."  
— Tom Marbeck, President, Antioch University Seattle

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*free*

how-to

e-newsletter...

[www.aherncomm.com](http://www.aherncomm.com)

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