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The data is in: Service excellence cultivates giving

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■ **Mark J. Marshall** is a managing associate in Bentz Whaley Flessner's Minneapolis office. He serves as the lead consultant in the firm's health care practice working with academic medical centers, health care systems and children's hospitals. With over 20 years of development experience, he brings a strong background in major and planned gifts, development operations, annual giving and campaign strategy to clients. He can be reached at mmarshall@bwf.com.

Think of donor cultivation in scientific terms, notably Newton's First Law of Motion:

An object in motion will remain in motion unless acted upon by an external force. What this means for fundraisers is that after the initial contact, nothing changes unless we do something. I call it Marshall's Law of Cultivation: A prospect will remain unmoved or unmotivated unless deliberately acted upon. To ensure that the movement remains constant and forward, our cultivation—our relationship building—must be strategic.

Fundraising is really relationship building

Let me offer an idea that may be viewed as heresy by many development staff members. Our job is not fundraising. Let me repeat that: our job is not fundraising. A fundraiser's ultimate role is as a relationship manager. However, a fundraiser is appropriately measured by the amount of dollars raised, and the great ones also measure their success in terms of relationships built.

Gifts that are truly raised—those gifts that are a result of our direct efforts with a significant prospect—should be the finest measure of our work. Reflect for a moment about the relationships you have had with friends, co-workers and even relatives,

Strategic Cultivation

By Mark J. Marshall

in which you began exchanging gifts for holidays or birthdays. Those gifts that are meaningful are the result of a deepening relationship. The gift giving feels natural and can even be sacrificial.

One might question if we really cultivate our personal friendships. Sure we do. How do we decide who to invite to attend a sporting or arts event? We may ask an old friend, or we may extend an offer to a new coworker. Whatever the activity, we are building a relationship. Very few people begin a relationship with the idea that they might receive a birthday present, but it can be a very natural outgrowth. We must apply this idea to our fundraising work.

This does not mean that we revert to an old model of fundraising that sometimes focused on becoming your prospects' BFF (best friend forever). Rather, it means we must focus on concerted relationship building that is methodical, intentional and focused on generating meaningful gifts. The success of these efforts is measured by the dollars raised.

The methodology

Many years after David Dunlop introduced the fundraising profession to the concept of "moves management," its premises are now universally accepted. These same

principles of moves management are ones we can apply more narrowly to cultivation as an isolated activity or phase of moves management.

Common wisdom and several research efforts tell us that a major gift requires approximately eight to nine meaningful contacts or "moves" in the language of moves management. Of these contacts, we usually anticipate that one to two will be discovery contacts and one to two will be solicitations. This means that four to six of these meaningful contacts will be cultivation contacts.

The basic math tells us that cultivation is in some ways the most important component. Solicitation could be viewed as simply a test of the relationship fundraisers build through cultivation. We all know that an effective solicitation is vital, but strategic cultivation sets the stage for a meaningful and clear solicitation.

So how much time and energy is spent on cultivation?

More importantly, how much time is spent on *strategic* cultivation—on coordinated actions that move us towards a desired outcome?

Strategic cultivation produces results, allows the donor pipeline to be effective and offers the greatest return on our investment. The relationship is managed through this process. Discovery and solicitation have their

place, but cultivation is the critical bridge to donor investment.

Shaping inclination

We cannot affect capacity, but we can affect inclination. Shaping inclination is ultimately what strategic cultivation is designed to do. We spend a lot of time on solicitation plans and some on discovery efforts, but cultivation is the most important part of our relationship with donors and our work as development professionals.

Let's return to the concept of our personal relationships for a parallel to development. If you met your future spouse and then a year later you saw that person again, a marriage proposal would be sudden and most likely rather awkward. Despite having conducted discovery and attempted solicitation, the relationship may not proceed. We use courtship to strengthen the personal relationship and hopefully guarantee the "right answer" when that ultimate solicitation is made. The middle part of that relationship is necessary to cultivating a successful outcome.

Let's apply this to a prospect relationship. We know that major and planned gifts occur when a prospect's values and interests intersect with the institution's. It may take time to learn these values and intersections.

Therefore, our cultivation efforts should serve to determine just how they intersect and perhaps clarify differences. The cultivation becomes strategic as we deliberately engage the prospect in realizing how the organization's mission and vision intersect the prospect's interests and values.

Take, for example, a family who has lost a child to an inherited genetic disease. Your institution's research protocols in bone marrow transplant or stem cell therapy offers a ray of hope for them, but so does other institutions' research. The cultivation serves to build confidence, identify shared values—in this case the elimination of or a cure for the disease—and build trust that you will deliver on promises made. That trust leads to the right to ask for their support of a mission that is near and dear to their hearts. This relationship must be earned through cultivation and will not happen accidentally.

Applying the methodology

A classic flaw of fundraising is the tendency to skip cultivation or more commonly to prolong an endless cycle of cultivation. Development professionals have spent hours at

lunch and in meetings with prospects and want cultivation to be perfect. The challenge is, perfect in whose eyes? Prospects and even board members will occasionally indicate they were ready to be asked and it never came, or it took forever. Data from a Bentz Whaley Flessner 2010 Affluent and Healthcare Survey confirm how frequently donors were not personally asked for a gift.

When we are not strategic about cultivation, we either skip key steps or we miss key signals. The path to great strategy is to be purposeful and thoughtful in approaching prospects. Let's apply basic moves management principals to the narrow band of cultivation. The following method helps ensure our cultivation strategies are effective.

Step 1. Understand the current condition

If we are to develop an effective strategy we must first have a clear perception of what condition we hope to change. *This is not the same as discovery work.* The purpose of discovery work is to determine whether this individual or organization has some affinity for our organization and/or some capacity to make a gift. Cultivation can strengthen affinity but it cannot always create it. By the time we have decided that a prospect is ready for cultivation, we have determined that the prospect has some level of capacity and usually some level of inclination.

One should check the current condition of the relationship with the following questions:

- What is the prospect's level of passion for the organization? Its mission? The project?
- What is their current relationship with the organization's leadership?

- Do they trust the organization and the people to perform?
- Where does this project and organization stand in the prospect's philanthropic priorities?
- What are potential barriers to the prospect making a gift? Other commitments?
- What is the prospect's financial ability to fund the intended request?

The development professional should determine what the desired level is for each of these issues. These questions may be revisited throughout the process.

Step 2. Identify what conditions must exist to produce a successful request

While it may be possible on occasion to meet all of the prospect's needs, invariably there will be a hierarchy of these needs. We need to know which conditions trump others. We should hypothesize at what level the prospect's needs must be met. For example, if the donor must develop confidence in or build a relationship with the organization's CEO, one must determine at what level that relationship or trust must be established.



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Vice President, Development

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Think about what must be present in the solicitation and explore that during cultivation:

- Does the prospect fund an endowment? Programs? Bricks and mortar?
- Is a named gift important?
- What relationships must exist?
- How much information must be available to the prospect?
- What is the relationship dynamic for a decision? Is there a spouse, or financial or legal adviser?

Consider two different scenarios: the parents of a critically ill child and a leading community member whose father was a physician at the hospital. The parents may be vastly more focused on a cure or treatment and, therefore, a physician or researcher may be vital to cultivation. The community leader may be focused on the family's legacy, and the CEO may play a much larger role in the relationship. Both are prospects but will require significantly different cultivation plans to maximize their giving.

Step 3. Develop a strategic plan to create these conditions

What critical activities or "moves" do we orchestrate to help accomplish the identified goal or set of goals? It may take multiple actions to accomplish one critical element. Building comprehensive action plans to accomplish the developed plans will be necessary when one looks at the totality of their prospect portfolio. If we consider that a typical major gift officer makes an average of 30 proposals a year and four to six contacts a week, we should be managing a significant amount of activity.

What features should be present in the action plan?

- The desired outcome of that particular activity.
- The key moves and the activities that will ensure the move is successful.

- The individuals who will play roles in each component of the cultivation.
- The time frame in which the specific activity is to occur.

Step 4. Implement a plan

At the end of the day, plans are good for one thing only—doing. If we cannot execute, the plan is for nothing. It is not uncommon to find prospects whose cultivations just ended, not because they were no longer prospects, but because they were lost in the shuffle. Worse still are those prospects who are placed into a never-ending cycle of cultivation.

Good implementation requires maintaining momentum. Therefore, a good cultivation plan is placed on a calendar, a database tickler system or otherwise operationalized.

Step 5. Review outcomes after each identified move

Dwight Eisenhower is reported to have once said, "Plans are useless, but the planning is invaluable." This is the process part. Each move should test our hypothesis and we should make a deliberate decision; Is our plan still valid, or does it need adjustment?

Great strategists are constantly evaluating and readjusting their strategies. Many great development officers do this instinctually. However, when we have more complicated gifts that may involve a CEO, physician or researcher, it is unrealistic that all our partners will be able to adjust to the same strategy without thoughtful consideration.

Step 6. Validate your cultivation plan


When we feel that we have successfully answered our questions, when we can visualize a "yes" to our invitation to participate, and making the gift seems a normal part of the


relationship we have developed, then we are ready to ask.

This process is a fluid one that requires us to continually review our strategy.

Invest the time


Relationship building requires strategic cultivation. Discovery and solicitation are integral, but the need for very deliberate cultivation should not be underestimated. Great gifts are a result of strategic cultivation. Cultivation will ultimately provide you with a road map for effective stewardship of the donor following a meaningful gift. That stewardship will once again allow us to begin our strategic cultivation of the next gift.

Investing time and energy into these six steps for each prospect is essential. The power of strategic cultivation is in comprehensively building a relationship with a prospect that identifies intersecting interests and helps the prospect accomplish something that is important to him or her in terms of making a difference. If you invest time into the relationship first and fundraising second, you can be assured of the best possible outcome. 



LARRY CHRISTENSEN
Vice President Resource Development

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