

95 percent of an organization's revenue comes from 5 percent of the gifts. Businesses focus their efforts on areas of greatest return, and so should development officers.

At Moffitt, about 15 percent of our gifts come from corporations and through corporate foundations, corporate matching gift programs, and key corporate individuals who may sit on other foundation boards. Although Tampa does not have a strong corporate base, the area has a number of regional offices.

Our Corporate Partners Program, a subcommittee of our board, is comprised of local corporate leaders and executives who bring a greater awareness of Moffitt Cancer Center to other corporate leaders who may be new to the area or unfamiliar with all that we have to offer.

Before developing a corporate relationship or inviting a corporate

representative to tour your facility, find out whether their employees can access your organization through their insurance carrier. Nothing is more embarrassing than touting your program during their visit and finding out that your institution is not included in the corporation's health care plan.

The holiday season is a good time to promote corporate giving. Encourage companies to revise their gift giving practices by making gifts in honor of employees and clients. You will solidify your relationship with the corporations as well as make new friends from those being honored. Send corporations sample cards to show them what will be sent to their honorees.

PLANNED GIVING

The news media are providing extensive coverage about the "great transfer of wealth" expected in the

next few years. By the year 2017, as much as \$26 trillion will be transferred from one generation to another. Health care institutions have an unprecedented opportunity to garner large gifts through bequests, charitable remainder trusts, and gift annuities.

Planned giving opportunities should be included as part of a comprehensive giving plan. Good candidates for planned giving are donors who have significant public wealth as well as the smaller, consistent donor who probably has the greatest interest in a planned gift. Through long-term, careful relationship building, information sharing, and nurturing, you can educate your repeat donors. Regardless of the amount given, repeat donors demonstrate a strong commitment to the organization and are ideal candidates for planned gifts.

Inspiring Donations of \$1 Million

Anne Arundel Medical Center's Capital Campaign

by Lisa Hillman, CFRE

Telling your story—what's new, what's different, what's heartwarming—is the first step to a successful fundraising campaign to benefit your hospital's cancer program. Get your story in the hospital's publications as well as the local media, and tell them why you matter. Make everyone fall in love with your organization. Then, give grateful patients a chance to give back.

Individuals comprise the largest percentage of contributors to non-profit organizations. They are often the people who are right in front of you. And if they can't give to you today, they might consider making a bequest.

Getting the "big gift"—donations of \$1 million or more—requires special planning through the coordinated efforts of your leadership and the development and public relations staff. After you have identified a potential

"big" donor, tell your story and involve the individual in your organization. Invite the potential donor to join a committee or offer a tour of your facility. Be sure to include the spouse.

It's also wise to build a peer-to-peer relationship. Introduce the potential donor to someone who has already made a big gift. When you are ready to ask for the gift, do so in a personal way and in a private setting—not over breakfast or lunch in a restaurant.

The leadership and staff at Anne Arundel Medical Center in Annapolis, Md., successfully raised more than \$21 million for a new hospital and \$2 million for a breast center over four years. While donations were received from a multitude of sources, more than one "big" donor pledged \$1 million.

One of those was Pat Sajak, host of "Wheel of Fortune" and successful media businessman. In the early 1990s, Sajak settled in

Annapolis with his wife Lesly. No ties or relationship had been established between the Sajaks and the hospital until the day their baby was delivered. A development staff member began a friendship with Mrs. Sajak and gradually involved her in campaign activities. At the time, the Sajaks were cross-country commuters and unsure of their long-term residence. Although they did not commit to a gift then, the hospital's development office continued to stay in touch.

During one of their stays in Annapolis, the Sajaks were invited to a hospice gala, and hospital leaders had an opportunity to say hello. About the same time, the Sajaks made friends with one of the hospital's board members who was a generous donor and active in the campaign. Recognizing their interest in the hospital, the board member invited the Sajaks to his home for a private party to thank major donors. There the couple learned

Here are some steps to make your planned giving program a success:

- Be sensitive when speaking with supporters about planned gifts, which are often equated with posthumous gifts.
- Encourage gifts of stock or real estate.
- Have a policy in place that addresses how these gifts will be credited. Will planned gifts (donations to be made as bequests) be credited for their full value or for the present day value?
- Listen carefully to determine donors' needs, such as whether they anticipate needing additional income in their retirement years or have appreciated property they "are not sure what do with."
- Don't offer advice in accounting or law unless you have the education, qualifications, and experience.
- Develop planned-giving commit-

tees comprised of accountants, attorneys, and trust officers who will serve as advocates and ambassadors for your program to colleagues, clients, and friends. Ask these professionals to give you guidance about estate-planning issues.

- Mail planned-giving newsletters, which can be purchased through an outside vendor, to your planned-giving donors, repeat donors, and estate planning professionals.
- Consider linking your web site to one of the planned-giving web sites that are now available online. This link allows supporters and professionals an opportunity to review planned-giving and recognition opportunities, and run planned-giving calculations based on their own information, 24 hours a day in the privacy of their home or office. Such a link also frees you and your information technology

staff from the burden of constantly redesigning the planned-giving web page based on, for instance, changing tax laws.

FACULTY AND FOUNDATION GRANTS

Obtaining research grants from cancer advocacy organizations, large foundations, and state or federal institutions, such as the National Cancer Institute, can be a laborious process that often doesn't yield funds for your efforts. Yet grant writing is a wonderful opportunity to reach funding sources outside of your geographic area. Focus the majority of your time and resources on the larger grants. Then, as time permits, address obtaining smaller funding.

Discuss grant applications in advance with your compliance and accounting office so gifts can be accurately credited toward your development efforts and will comply with new regulations. Also, remember that communication between departments will help prevent two different departments from applying for grants from the same funding source.

At Moffitt, our greatest success in obtaining grants has been with foundations that have a relationship with us. Many of their trustees have been to Moffitt to see our research laboratories, hear from our researchers and physicians, and learn about our vision. They support our programs, and they trust us to use their funds wisely.

SPECIAL EVENT PLANNING

Management, boards, and staff tend to rely on special events because they bring tangible results and are a good way to involve donors and their friends. Yet, when actual costs of events are determined (including the cost of staff and volunteer time that might have been spent developing major gifts), special events turn out to be expensive endeavors.

Instead of committing valuable time and resources to special events, encourage civic clubs to host outside events for your organization. Fundraising activities may include golf tournaments, gala balls, fishing tournaments, boating regattas, car washes, and walks/runs.

Designate someone in your organization to serve as a liaison

more about the campaign and the community effort that had made it so successful.

Shortly thereafter, the couple was invited to tour the existing breast center, where the director greeted them and talked about the services and facilities. Later, the couple joined the hospital's president for lunch in his office, and the director of oncology spoke about his dreams and vision. The Sajaks reviewed plans for the new breast center and learned more about the campaign.

Then the chairman of the capital campaign, himself a \$1 million donor, turned to the Sajaks and asked them to consider pledging \$1 million over five years. The couple was quiet for a moment, then said that they would think it over.

Two weeks later, Pat Sajak called to say they would pledge \$1 million. Although no family member had a history of breast cancer, the Sajaks wanted to be involved. The couple was impressed with the hospital's leadership, liked the expansion plans, and decided the organization was fiscally stable. Pat Sajak also said he wanted to learn more about breast cancer. So, a dinner with key staff physicians was arranged. The sincerity and genuine interest expressed by the Sajaks

kept the process moving and reassured all involved that making this generous gift was the right thing to do. The thank-you calls and notes of appreciation from the staff and the community began immediately and continue to this day.

This gift took six years of development effort. The staff recognized the Sajaks' appreciation of the hospital and their ability to make a large gift—then nurtured that seed. In honor of their gift, the pavilion that houses the breast center was named *The Lesly and Pat Sajak Pavilion*. About 1,200 community leaders, major donors, and breast cancer survivors attended the dedication ceremony in March.

Receiving a "big donation" is a win-win situation for your program and for the donor. All it takes is *finding* the right person and *asking* the right person for the right gift at the right time. Then be patient and let it happen. ☺

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