



RON SCHILLER
FOUNDING PARTNER

ASPEN • LEADERSHIP • GROUP

AUTHENTIC COMMUNICATION

**20TH ANNUAL SUMMER FORUM
PLANNED GIVING ROUNDTABLE
OF ARIZONA**

JUNE 2014



THE GIFT OF TRUST

“The ‘gift’ that is most important in our calling is the gift of trust that precedes the most significant investments benefactors make in our institutions. Every monetary gift regardless of size gives benefactors the opportunity to test our sincerity as well as our effectiveness.”

**Curt Simic, President Emeritus, Indiana University
Foundation**



AUTHENTICITY

“Nothing is more important in our work than authenticity. Authentically embracing our organization’s mission, our work with donors, our colleagues, and our staff is the wellspring of sincerity. Sincerity, combined with diligent follow-up, breeds trust. It all starts with authenticity.”

Tom Herbert, VP, Miami University of Ohio



BELIEF AND CONFIDENCE

**Not enough to represent a worthy
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**Must gain belief and confidence of
potential donors, understand
motivations in giving—intellectual and
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Must gain belief and confidence of potential donors, understand motivations in giving—intellectual and psychological

Building relationships involves finding points of connection



DONORS WANT TO TALK TO REAL PEOPLE

Philanthropic process is personal and emotional



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Immediate vs. long-term needs

Privacy and security



PLEASURES AND PERILS

Building trust is a two-way street



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**Be prepared to represent an institution
professionally, knowledgeably,
passionately**



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Two ears, one mouth

**There are pleasures—and sometimes
perils—in human discourse**



PLEASURES AND PERILS

RACE



PLEASURES AND PERILS

RACE

RACE AND GENDER



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GENDER



PLEASURES AND PERILS

RACE

RACE AND GENDER

GENDER

SEXUAL ORIENTATION



PLEASURES AND PERILS

RACE

RACE AND GENDER

GENDER

SEXUAL ORIENTATION

FAMILY DYNAMICS



AVOID RELIGION AND POLITICS

A

AVOID RELIGION AND POLITICS

Nonsense!

A

AVOID RELIGION AND POLITICS

Nonsense!

Religious organizations: largest share of philanthropy



AVOID RELIGION AND POLITICS

Nonsense!

Religious organizations: largest share of philanthropy

Religion and politics shape who we and donors are, shape values that consciously and unconsciously inform giving decisions



HOW DO WE RESPOND?

Should we argue? Leave? Change the subject?

Should our institutions back us up?

Why are we there?

Should our response be guided by our mission?

Is there one right answer?



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SAYING “NO”

Perhaps easy to walk away from a \$50 gift

What happens when it's \$1 million?

What happens when it's 25% of your annual fundraising?

When all the senior people in your organization are hoping against hope that the gift will become a reality?

What is the right moment to say no?

Who has authority to say no?



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BE AUTHENTIC

“A prospective donor said to me, ‘This won’t work if I am ‘the billionaire’ and you are ‘the development officer.’ It was the turning point to a more natural way of talking and working together.”



BE AUTHENTIC

Don’t retreat into “institution speak” or “sales pitches”

Bring passion, integrity, experiences, and flaws—use best judgment

Trust that colleagues and donors, like family and friends, will sort it out and find you a worthy partner in accomplishing their aspirations



BE AUTHENTIC

**Friendships regularly and naturally
spring from these relationships**

Chuck's Ashes



CREDIBILITY: MORE THAN SOUND BITES

**Don't insult intelligence or condescend
by avoiding complicated or
controversial topics**



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**Don't insult intelligence or condescend
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**Donors frequently disagree with
institutional decisions—build trust
through honesty**



BE YOURSELF

**Never express personal beliefs and
opinions?**



BE YOURSELF

Never express personal beliefs and opinions?

Expect the best or the worst?



OPTIMISM IS RISKY

Our profession is rooted in optimism

We look for the best in people and in institutions

Sometimes we have to say “no”

**Other professions rely on skepticism:
audit, risk, etc.**

Our greatest challenge is usually to get to “yes,” removing obstacles



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NO PHILANTHROPIC INTENT

“A few years ago, a donor wanted to donate some land to my organization. It eventually became clear he was only interested in the donation because he couldn’t get the sales price he wanted and wished to get an income tax deduction and not have to pay property taxes. There was no real philanthropic intent. It was my job to tell him we wouldn’t take the gift.”



THE COURAGE TO SAY “NO”

Sometimes we have to say “no” to the donor who is trying to take advantage

Sometimes we have to say “no” to the president who, under pressure, is overlooking proper stewardship

Sometimes we have to say “no” to potential donors simply to be honest partners, so those donors will trust us with the next gift



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BE YOURSELF

**Watch out for personal biases and
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**Remember that we are stewards of our
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The more we are personally invested in the mission, the easier it is to be authentic



AUTHENTICITY AND HONESTY

“Willingness to enter a philanthropic conversation and confidence in a philanthropic decision will almost certainly be influenced by a donor’s trust in the institutional representative with whom they work and the depth of their belief that that individual is authentically and honestly representing the institution’s priorities while respecting their particular philanthropic interests.” David Unruh, former SVP, Temple University



KNOWLEDGE, PASSION, & AUTHENTICITY

**We and our donors engage in an
extraordinary human act—
philanthropy**



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**Connect with donors as human beings,
with two-way authenticity**



AUTHENTIC COMMUNICATION

Q&A

DISCUSSION

