



**RON SCHILLER**  
FOUNDING PARTNER

**ASPEN • LEADERSHIP • GROUP**

---

---

---

---

---

---

---

---



## **POSITIONING FOR PARTNERSHIP**

Presented by  
**Ron Schiller**  
Aspen Leadership Group

AFP Greater Arizona  
Planned Giving Roundtable of Arizona  
US Trust Bank  
May 16, 2016

---

---

---

---

---

---

---

---

### **U.S. TRUST SURVEY - HNW PHILANTHROPY**

Percentage of high net worth donors who  
have a specific strategy in place to guide  
their charitable giving:

**73%**

---

---

---

---

---

---

---

---

**U.S. TRUST SURVEY - HNW PHILANTHROPY**

#1 reason high-net-worth individuals were hesitant to give:

Belief that the gifts won't be used wisely

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

DONORS vs.  
ORGANIZATIONAL LEADERS

"Donors are usually the easiest when it comes to sight-raising," says Curt Simic. "Getting an organization's leadership to raise their sights must be accomplished first. Otherwise, donors will sit on the sidelines or gravitate to other organizations with bold vision and leadership."

"Donors who have a history with the organization can be among the most helpful in raising the sights of internal leaders," he adds.

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

**ORGANIZATIONAL LEADERS:**

•Belief that the organization is worthy of philanthropic investment:

**Donors scale gifts**

- Top giving opportunity? (CMU, SBC)
- Big idea? (UC)

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

ORGANIZATIONAL LEADERS:

- Belief and confidence in the organization's strategy and planning, and ability to inspire belief and confidence in others—internally and externally

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

ORGANIZATIONAL LEADERS:

- Belief and confidence in the organization's strategy and planning, and ability to inspire belief and confidence in others—internally and externally
- Belief and confidence in each other

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

ORGANIZATIONAL LEADERS:

- Belief and confidence in the organization's strategy and planning, and ability to inspire belief and confidence in others—internally and externally
- Belief and confidence in each other
- Confidence in the CDO

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

ORGANIZATIONAL LEADERS:

- Confidence in donors as *philanthropic partners*

---

---

---

---

---

---

---

---

**CONFIDENCE IN PHILANTHROPIC PARTNERSHIP**

“Smart organizations create a space in which major donors more readily voice their own philanthropic objectives, fully aware that their offer of an idea conveys an offer to fund the idea,” says one leading philanthropist.

---

---

---

---

---

---

---

---

**CONFIDENCE IN PHILANTHROPIC PARTNERSHIP**

In this space, in the words of one university president, “Some donors will respond to another person’s idea by saying, ‘I want to do exactly *that*,’ while other donors may respond to the context of ambition and achievement, rather than another person’s idea, and offer, ‘I want to do something like *this*.’ ”

---

---

---

---

---

---

---

---

**BELIEF AND CONFIDENCE**

STAFF *throughout the organization.*

- Belief in the mission
- Confidence in organizational leaders
- Confidence in plans and goals
- Belief that their individual contributions will make a difference

---

---

---

---

---

---

---

---

**MISSION ALIGNMENT**

“The best nonprofit managers and staff members I’ ve known have a deep, personal connection with an organization’ s mission,” says Joan Harris. “They relate, intimately, to the passion of board members, volunteers, and donors, and this results in much more effective fundraising.”

---

---

---

---

---

---

---

---

**WE MAY NOT NEED TO ASK; WE MAY NOT HAVE THE OPPORTUNITY TO ASK**

“Most of our gifts have been self-investigated and self-initiated,” says Dennis Keller (whose family has given nearly a dozen eight-figure gifts). “The best way, that has the happiest reverberations for philanthropists and organizations, is to encourage deep engagement through which philanthropists figure out what they want to do based on their core beliefs and informed desires to help.”

---

---

---

---

---

---

---

---

**OUR ROLE: FACILITATOR**

“Most of our gifts have been self-investigated and self-initiated,” says Dennis Keller (whose family has given nearly a dozen eight-figure gifts). “The best way, that has the happiest reverberations for philanthropists and organizations, is to encourage deep engagement through which philanthropists figure out what they want to do based on their core beliefs and informed desires to help.”

---

---

---

---

---

---

---

---

**BE OPEN TO PARTNERSHIP**

Gary Comer: “My wife Francie and I have been determined to find the most effective ways to give back to my old neighborhood. We have chosen to do that by focusing on fundamental needs, such as children’s health and education. What could be more important than that?”

---

---

---

---

---

---

---

---

**OUR ROLE: FACILITATOR**

To build relationships with individuals which allow us to get to know what they value, and for them to get to know the values of our institutions

*Whose values come into play, then, in these relationships?*

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

- *Start with the donor*
  - *Go and see them*
  - *Ask them what they want to accomplish*
  - *Ask them how to ask them*
  - *Ask them how to thank and recognize them*

---

---

---

---

---

---

---

---

**WHAT'S THE FIRST QUESTION?**

“Have you met our new president? Have you seen our new building?”

Or...

“Have you heard about our new and exciting strategic plans?”

---

---

---

---

---

---

---

---

**WHAT'S THE FIRST QUESTION?**

Or maybe...

“What are you trying to accomplish with your philanthropy, and how might I help?”

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

- *Let the donor spread belief*
  - *Introduce them to each other (have they even met?)*

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

- *Be a philanthropic partner*
  - *Serve on a board*
  - *Make a partnership gift – a step in the direction of your ultimate gift*

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

- *Don't chase wealthy people first*
- *Enable philanthropists! (self-solicitation)*
- *Pay attention to philanthropic priority, not just wealth and affinity*

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

- Identify those with the greatest potential/inclination to make your organization a *philanthropic priority*

**Ratings:**

- Wealth capacity
- Inclination
- PHILANTHROPIC PRIORITY: these are future volunteer leaders and future philanthropic partners

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

- *With boards, focus on collective responsibility: boost commitment through shared objectives, and eliminate finger-pointing*

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

MENDELSSOHN CHOIR OF PITTSBURGH  
Belief and confidence in the board  
Belief and confidence in the plan  
Choir member had belief and confidence in the mission!

---

---

---

---

---

---

---

---

**FACILITATING PHILANTHROPY**

What can I do?

• *Partner internally to partner externally*

- *Division of responsibility: silos, or team?*
- *Credit*
- *Do colleagues believe their contribution matters?*

---

---

---

---

---

---

---

---

**POSITIONING FOR PARTNERSHIP**

The University of Chicago exists "to grow knowledge so that human life may be enriched." Our volunteers and donors are essential partners in furthering this mission. In working with them to secure support for this mission, we aspire to a level of excellence that compliments that which is expected of and by our faculty, students, alumni, and other members of our University of Chicago community. Since our success is defined by the generosity of others, we in turn are generous with each other, investing in and celebrating the success of the work we do together.

---

---

---

---

---

---

---

---

**POSITIONING FOR PARTNERSHIP**

Use language that supports philanthropic partnership:

- *Shared objective* rather than "need"

---

---

---

---

---

---

---

---

**SHARED OBJECTIVE RATHER THAN NEED**

We are not needy!

---

---

---

---

---

---

---

---

**MUTUAL BENEFIT**

Use language that supports philanthropic partnership:

- *Shared objective* rather than “need”
- *Mutual benefit* versus indebtedness

---

---

---

---

---

---

---

---

**MUTUAL BENEFIT**

“My support of the arts has allowed me to meet amazing people who enrich my life,” says Mercedes Bass. “I learn a lot from them, and it’s great fun to be with them. They include world-renowned soloists but also the people who build an organization’s artistic reputation each and every day—the conductor, the orchestra players, the chorus master, the chorus members, and so on.”

---

---

---

---

---

---

---

---

**SAYING "THANK YOU" IS ONLY A START**

- Gratitude first...

---

---

---

---

---

---

---

---

**DELIVER RESULTS**

- Gratitude first...then RESULTS

---

---

---

---

---

---

---

---

**DELIVER ON PROMISES**

"Organizations and philanthropists need to measure results and deliver on promises," says Tim Gill.  
"Philanthropists should and will cut off programs and organizations that don't work and move on to something that does."

---

---

---

---

---

---

---

---

**BUILDING BELIEF AND CONFIDENCE:  
WHAT CAN I DO?**

**FACILITATE  
PHILANTHROPIC PARTNERSHIP**

---

---

---

---

---

---

---

---

**PARTNERSHIP**

Who, then, benefits from the partnership?

John D. Rockefeller: "Why shouldn't people give to the University of Chicago money, time, their best efforts? It is the grandest opportunity ever presented...I am profoundly, profoundly thankful that I had anything to do with this affair."

"The festival is a truly special place," Matthew Bucksbaum says. "Kay and I have long believed in it, especially the incredible students whose energy keeps classical music vital. We're just so grateful that we're able to do this."

---

---

---

---

---

---

---

---

**OUR ROLE: FACILITATOR**

"The best way, that has the happiest reverberations for philanthropists and organizations, is to encourage deep engagement through which philanthropists figure out what they want to do based on their core beliefs and informed desires to help."

---

---

---

---

---

---

---

---