Coming together is a beginning; keeping together is progress; working together is success.
-Henry Ford, *Remarks of Famous People*

Remember the four steps to integration. We are at the last of #3:

- ✓ 1. Assessing your readiness
- ✓ 2. Understanding the "Program"
- ✓ 3. Avoiding friction points with other development efforts

4. Capacity to manage

CEO or Executive Director

The first issue to tackle is whether the CEO we are about to discuss here is the CEO of the organization or of the organization's foundation. The CEO of the foundation, if there is a foundation, is necessarily deeply involved in all aspects of fundraising. Thus, we do not need to figure out how to coordinate and integrate with him or her (I hope).

However, the CEO or Executive Director of a nonprofit where there is no supporting foundation will be pulled in many directions and time will be difficult if you or you and the head of Development needs to set meetings with him or her. Getting a meeting of any significance also depends on that person and his or her style of management. The range of possibilities on how to get an audience (you or you and your supervisor in development if you have one) is a broad as humans themselves. This makes my advice to you somewhat difficult to formulate.

But consider your goal—you want to integrate asset-based philanthropy into this organization. That takes leadership from the top so you can work with the business office (and they with you), get support work from other departments, develop policies to protect the organization, and define procedures so all moving parts of the organization we have already addressed in this Module 2 about integration and avoiding friction points function like "a well-oiled machine".

Assuming your development office agrees that asset-based philanthropy is something to start right now, and if you can snag some time with the CEO alone or with others in your development office as required, then I suggest you introduce the Major Gift Stack concept with the CEO *in conjunction with the chart of assets* from Module 2, Session 6. You need to convince your CEO that this is where the real money is. Your CEO got to his or her position by being savvy. He or she will get it right away. Don't waste his or her time. Tell him/her what you need to roll out the program. Cooperation. Integration. Everything we have covered in Module 2.

And there is one way to get it fast—enlist the CEO. Ask for help in making it known to everyone possible in the organization that this program is being adopted and is fully supported by the CEO. And, please, don't go into this meeting unprepared.

It would help if you do this AFTER you do the two sets of plans we will cover in Module 4—the business plan (very simple) and the marketing plan (very convincing). If you happen to have worked out the 5 sources of revenue of a nonprofit and the rate of return of each, that could accompany your materials for the meeting. Use summary form for everything. Your CEO is a busy person.

Board Members

Over the years of my work in this field, I have changed my views on nonprofit Boards. Of course, that may be because over that time I became a board member of a number of nonprofit and association boards and got to see just how they work—or don't. Originally, I thought a nonprofit board had a broader role in assisting with planned and asset-based gifts, but now I view that role as very limited and well-defined. And it does not include asking for gifts of a complex nature. In fact, I should have entitled this section as "Please, board members, don't ask donors for planned gifts!" I'll explain below.

The board needs to understand that the ongoing financial vitality of the organization depends on long-term programs. The key is to coordinate major/planned gift efforts with the strategic planning undertaken by the board. Sometimes, in board presentations, I liken the maturity of an organization to an individual. An individual in his or her 20s will live paycheck to paycheck. In his 30s, he may be struggling to support and educate children. In his 40s and especially his 50s, he starts to realize he probably should have begun planning for retirement earlier. The need for a giving program that focuses on long-term receipts and an endowment (two very different things) is akin to discovering that the organization ought to be "saving for retirement" and probably should have started earlier. Maybe the organization did start earlier. Maybe the major/planned giving program just didn't develop properly or well.

Now may be the time to start the asset-based philanthropy program encompassing all of major, structured outright, planned vested, irrevocable deferred receipts, revocable deferred receipts and even double deferred receipt gifts. If you were going to do this now, how would you go about it? What would the board's role be?

Remember we discussed not bludgeoning your board for planned or deferred receipt gifts? Trying to make them give some type of asset gift or a bequest (in all the forms we discussed in Module 1) causes many board members grief. Many feel it is intrusive into their personal affairs. I suggested in that Module to let them come along at their own pace. How do you do that?

By letting them know first that a combination of short and long-term gifts is essential once an organization "grows up". I think board members prefer presentations on the mission and programs and the finances of the organization to achieve those. They like to feel a sense of success, but know they need to deal with issues and problems as they come up. Therefore, any presentation to the board about fundraising might best not discuss fundraising but be about achieving mission through short and long-term revenue. A definition of this is essential so that a board begins to see that financial support automatically includes receipts from donors—whether individual or corporate or foundations.

What is the best way to do that? The five sources of nonprofit revenue chart fully filled out by working in conjunction with the business office. For the first time, I will now explain another facet of this chart. When you sort the various aspects and accounts that produce revenue into the five sources, also assess the cost against that revenue so that you find NET revenue. This leads to an amazing statistic—rate of return (a percent, the numerator of which is the net revenue divided by the total revenue from that source). Do you know which part of the five sources of revenue is the most profitable?

Generally, it is the development office revenue. Its rate of return, if the program is well managed, is usually higher than the other four sources of revenue.

This may generate interest in what Development or Institutional Advancement really is—a lucrative source of revenue. From there, you can now intermittently engage them in a story or case study based on assets. Board members are out in the community. They know lots of folks with lots of assets. All they need to see is great results in your case studies where dealing with an otherwise illiquid asset such as real estate or business interests resulted in a fantastic plan for the donor—and profit for the donee.

They will little by little take it from there and be willing to ask you about an asset, a situation with someone they know, or want more information. You don't need to bludgeon them. And if the timing is right for one of their assets, they will let you know.

All you need is a good set of case studies, either yours or those of other, or even ours in this course. Their only job is to spot issues, cases where they think a person might benefit from techniques like the ones you have shown them. They can serve as introducers, but not askers.

Department Heads

Like the board members, you do not want them to propose gifts of a complex nature without training. You now understand how to ascertain needs, wants, etc. in a donor's situation and will be learning much more about that in the upcoming Modules. Department heads don't necessarily know this. But they can be great ambassadors.

How? The proven strategy is this—if you get one gift in an interesting case (or borrow one from one of your colleagues' experiences for Show and Tell), ask if you can set a meeting with department heads to showcase the money/assets received in your case. And ask the most important question—if such and such department can get this much money by working with us, why not you? Your meeting notice will say just that. And you will promise to show them how.

What you will show them, just like the board, is assets to watch for and life situations to listen to, and if it appears there may be an opportunity for a gift of assets, to call you right away.

When you get another gift for a department, "rinse and repeat", as they say. Do another meeting and showcase it. Pretty soon you will have a host of internal markets. But do train them NOT to ask for a gift, but to call you. You won't run their department if they don't ask for the gift themselves. Each to his own expertise.