

AHP Mid-Atlantic Regional News

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Guidance From A Mentor

By Jay Angeletti, AHP Mid-Atlantic state representative

As I fashioned this year's professional resolutions and topics to discuss with colleagues, I recalled an old mentor. Jack Ogilvie, M.D. was a surgeon, generous donor and campaign chair; he also was thoughtful and handled matters deftly. Jack always began his suggestions with "Have you ever thought of ...?" This was an effective technique and a gentle way to let me know there were myriad things I could do to enhance our work with current and prospective donors. I am grateful to Jack for helping my colleagues and me step back from our every day challenges and think critically about the larger scene. So, in Jack's name I ask:

Have you ...

1. Studied and digested the proposed legislation regarding charitable gift deductibility and communicated it to your staff, trustees and donors? Regardless of your political stripe, if enacted, these tax changes will affect important constituencies; we should be well versed on both sides of the argument.
2. Developed a comprehensive plan to continue to connect lead donors to your organization – those at the top of your pipeline? Do so in a meaningful, personal and systematic way in 2010. For example, one of my clients has a retired and revered physician call all donors of a certain level. Another client sends a monthly *Insiders* email to prospects/donors rated at \$250,000+.
3. Taken time to speak with each member of your team to let them know how their work (regardless of their title or position) contributes to the overall mission of your organization? When I recently visited a hospital trustee, a sign in his headquarters lobby proclaimed, "Culture eats strategy's lunch every day." I liked that.
4. Written a letter to your Top 10 Annual Fund Donors asking for their continued support in 2010? Not yet? Thank them, and tell them how important they are.
5. Looked critically at the list of your Top 25 prospects? And – if your information system doesn't allow you to print out a user friendly, one page report listing these donors – create your own spreadsheet. Include prospect name, area of interest, timing and amount of next request, stage in the giving cycle, next step and date. I don't endorse duplication, but you need this information at your finger tips – all of the time.
6. Become an expert in explaining the daily vicissitudes of the stock market, jobs reports and, in turn, why 2009 was down? Then make 2010 the year you become an expert in encouraging your donors to be creative in using giving vehicles – real estate, trusts, annuities, and insurance – and explain why 2010 will be up!
7. Met with small groups of colleagues informally to pick their brains regarding how you can work more effectively? Include colleagues from large and small organizations alike. We all have good ideas and can learn from each other.
8. Asked someone to assess your Development program. If it's someone you trust, the result will be a rewarding process that will fine tune your team!