Book Reviews

Innovations in Annual Giving: Ten Departures that Worked

By Robert A. Burdenski, CASE Books, Washington, DC, 2003;
ISBN: 0-89964-378-7; \$41.95 for CASE members, \$55.95 for nonmembers

Bob Burdenski's *Innovations in Annual Giving: Ten Departures that Worked* highlights 10 institutions that made strategic decisions to strengthen their annual giving programs for reasons ranging from alumni participation to bridging the gap from annual to major gifts. The book provides 10 success stories that anyone in annual giving cannot help but admire.

Burdenski divides *Innovations in Annual Giving* into three sections. The first, entitled "They Created Better Appeals," highlights direct mail, telemarketing, and the use of the Internet. For his direct mail departure Burdenski chose the University of Iowa, which was in need of a more effective direct mail program. This chapter provides a look at direct marketing, offers a terrific idea for addressing decade appeals, and outlines the anatomy of a solicitation letter. Burdenski also offers advice for smaller schools, which is particularly helpful. In comparison to the example of direct mail, the volunteer phonathon discussed seems somewhat surreal in today's world of technology. Kansas State University has made a conscious decision not to automate its campus phone center and uses only volunteers rather than paid student callers.

KSU's creativity and ingenuity is to be commended and their "departure" is remarkable. The chapter provides an actual caller placemat that might be useful to some readers. Burdenski utilizes the University of Rochester for his primary example of integration with the internet but mentions eight other schools and their "killer applications." This particular chapter is a good reminder of how an institution's annual giving office may have all of the right web tools in place yet may not be raising money.

The second section of the book, "They Created a Better Culture," provides examples of a philanthropic curriculum for students, a young alumni giving program, an effective volunteer program, and a gift club that was designed to upgrade leadership annual giving donors to major donors. In an era when many schools struggle with young alumni participation, Burdenski shares Stanford University's giving culture curriculum which may finally provide an answer to the question: how can we effectively teach students about philanthropy? Though the curriculum may seem labor-intensive there is little doubt as to why Stanford has succeeded in creating a strong alumni-giving culture. The young alumni giving

departure recognizes that a senior gift campaign may not be the answer for all schools, and yet the next chapter regarding volunteers proves why the success of all fund-raising programs begins with effective volunteers.

In the introduction to *Innovations in Annual Giving*, Burdenski acknowledges that there are times when annual giving directors become “befuddled” about how to effect change on their campus. In the 10 departures that are presented, it is clear that Burdenski chose these specific schools because of their ability to ask the right questions and create and successfully present ideas that were then closely measured. The results speak for themselves. Carnegie Mellon University faced a challenge in upgrading \$1,000 donors to major donors, thus they launched a new giving society enabling donors to name a temporary scholarship. Burdenski recognizes that Carnegie Mellon asked the right questions before finding a solution to the problem at hand.

The third and final section of the book, called “They Acquired Better Knowledge,” will remind all advancement professionals that the successful management of an annual giving program is no longer just about direct mail and telemarketing but rather maneuvering through an intricate web of detailed planning and statistical analysis. This section highlights data mining for donor retention, the

importance of market research, and finally the need for both annual and long-range annual fund plans.

Burdenski recognizes that annual giving should be the springboard of any institution’s development initiative, yet he acknowledges that this is an enormous process that is often taken for granted. Burdenski proposes his own alternative to the classic donor giving pyramid, which, he notes, fails to recognize the various stages that donors progress through in an annual giving program.

Innovations in Annual Giving provides 10 examples on how to keep your fund fresh and in the forefront of your vice-president’s and president’s minds. Though the book specifically highlights 10 institutions Burdenski adds anecdotes from many other colleges and universities. Combined with visual examples of direct mail vehicles, annual plan outlines, and more, the book is a quick yet eye-opening read about how annual giving programs can change and work successfully. Annual giving professionals will want to read it from beginning to end and may even copy a chapter or two for their alumni relations and major gifts colleagues. Success stories make anyone feel good and Burdenski capitalizes on this in *Innovations in Annual Giving*.

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Achieving Excellence in Fund Raising, 2nd edn.

By Henry A. Rosso and Associates, ed. Eugene R. Tempel, *The Jossey-Bass Nonprofit and Public Management Series*, Jossey-Bass, San Francisco, CA, 2003; ISBN 0-7879-6256-2; \$40

The new edition of *Achieving Excellence in Fund Raising* offers an excellent overview of modern challenges and opportunities in the nonprofit sector, as well as detailed strategies and programs that are founded on Hank Rosso's belief that, "fund-raising is the gentle art of teaching people the joy of giving." The text is a collection of chapters written by academics and practitioners in the world of fund raising, philanthropy, and nonprofit management focused on evolving fund-raising opportunities, technological advancements, and the implications of the ongoing professionalization of fund raising. Eleven new chapters have been written for the new edition and virtually every chapter from the 1991 edition has been updated.

Practitioners who are looking for a collection of how-to guides and program templates may find the text's length and density a bit daunting at first. Nonetheless, the text is very easy to read, and novice and midlevel practitioners interested in specific topics will find the individual chapters both useful and accessible. One of the text's greatest assets is how the collected perspectives and fund-raising strategies are woven together with Rosso's philosophical views on philanthropy. Fund-raising practitioners who are interested in a holistic view of the world of philanthropy will discover a

rich text that emphasizes the value of a philosophical foundation to any fund-raising program based on values of stewardship, contributions to the public good and the maintenance of public trust.

Editor Eugene Tempel has made a point of reprinting Hank Rosso's original chapter, "A Philosophy of Fund Raising" as a testament to the relevance of the fund-raising principles he espoused during his lifetime. Hank Rosso stressed fund raising as a means to serve the public good, and believed that an organization earned the privilege to ask for gifts through the ethical stewardship of its board, the accountability of its staff and management, and the worthiness of its programs. The new edition's chapters have been organized around these principles and divided into seven parts that can be read from beginning to end or used as individual reference guides. The ultimate goal is the creation of a "total development plan" that is characterized by a set of fund-raising programs designed for lifetime donor development.

The first two sections of the book provide a philosophical and historical context for philanthropy and discuss the fundamental organizational tasks required to reach institutional readiness and support a fund-raising plan. Part One is an introduction to the role of philanthropy, its history in the United

States, and the new challenges faced by the sector such as increasing demands for accountability, tax structure changes, the character of “new donors,” and opportunities for philanthropy in the twenty-first century. Part Two lays out many of the fundamental programs necessary to planning a successful fund-raising program. The chapters focus on identifying the organization’s strengths, weaknesses, and constituency along with solidifying the governance structure. These steps are considered integral to Hank Rosso’s “total development plan” and will most likely be familiar to practitioners already involved in strategic planning and marketing activities.

Practitioners actively engaged in developing fund-raising programs will find Part Three, Part Four, and Part Five to be particularly useful as stand-alone reference guides. These sections present the most detailed information in the book, including step-by-step instructions and templates to develop the various programs, or “vehicles” that make up a “total development plan.” Part Three details the building blocks necessary to implement and manage an annual fund program, a major gifts process, a planned giving process and a capital campaign. Part Four includes several perspectives on how to reach individuals, corporations, and foundations. The three new chapters in this section look at the growing force of women in philanthropy, different cultural approaches in philanthropy, and contemporary perspectives on reaching the “new donor” who is interested in venture philanthropy and has an increasingly hands-on attitude coupled with a keen interest in accountability and results. Part Five of the text includes specific fund-raising strategies such as using direct mail and the internet, grassroots fund-raising, and how to organize and structure special

events as part of a total development plan.

One of the most important aspects of developing a successful fund-raising program is a tightly integrated management structure. Part Six offers a discussion of building fund-raising teams, exercising leadership through fund-raising, and involving volunteers. There is a special chapter on board management and how to engage the members in fund-raising activities and organizational development. The last two chapters in this section highlight budgeting as a management tool and offer guidance in successfully hiring consultants to fill gaps in the expertise of the fund-raising team.

Part Seven of the text is devoted to “Ethics, Stewardship, and the Future of the Fund-raising Profession.” The public holds the nonprofit sector to an extremely high standard and the sector’s tax-exempt status depends on effectively communicating the societal value and integrity of its activities. Editor Eugene Tempel writes that, “at the end of the twentieth century only 57 percent of those surveyed in a national study indicated they trusted higher education.” The challenge put forth in this section is to address what Rosso called, “the professional stance” of the fund raiser as a servant of the public trust. The chapters include a discussion of the ethics of decision making and stewardship, as well as a collection of resources tailored towards strengthening fund-raising skills.

Achieving Excellent in Fund Raising is a comprehensive text that is an excellent textbook choice for college and university courses and a useful reference book for professional fund raisers. The breadth of topics, collection of program tools and templates, and discussions of the changing landscape of donor relations provide an

invaluable view of the fund-raising process and effective presentation of the founding principles of the profession.

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Fund Raising from Black-College Alumni: Successful Strategies for Supporting Alma Mater

By Marybeth Gasman and Sibby Anderson-Thompkins, CASE Books, Washington, DC, 2003; ISBN: 0-89964-377-9; \$36.95 for CASE members, \$48.95 for nonmembers

All advancement professionals know that alumni giving is an important measure of the success of our fund-raising programs. More to the point, the key figure is the percentage of alumni who donate to the institution on an annual basis. This book provides some solid advice for practitioners seeking to increase giving from black college alumni. The focus of the book, however, is more on the motivations for black alumni giving and the strategies employed by black colleges to secure alumni support. The authors also examine whether black colleges are tailoring their messages and tactics to take advantage of known donor motivations.

Gasman and Anderson-Thompkins set the stage by presenting a brief but excellent history of African American giving. This history reveals that black giving has been rooted in several key motivations—personal engagement, trust, uplifting the race, and giving back. The comparison made of black and white giving motivations is instructive.

While the authors are not practitioners, they offer sound observations and end

most chapters with practical recommendations. What makes the book especially useful for veteran fund raisers as well as novices is the way the authors couple the information gleaned through their literature research with comments from senior advancement officers. An excellent example of this approach is found in the chapter titled “Educating Alumni.” On this issue the literature and the experts agree: “Education is the key to changing alumni views of annual giving and endowment contributions.”

In the end, however, people give to people. In chapter 7 the authors note the critical importance of recruiting and training development staff and having an adequate budget. The final chapters address less obvious but important ideas such as:

1. Segmenting the alumni database so as to focus extra attention on prospects with great giving capacity;
2. The importance of using faculty, staff, and other volunteers to help raise funds for the institution;

3. Cultivating the spirit of giving by turning students into donors now and into the future.

The authors conclude by suggesting some other literature that should be on our bookshelves.

This book is a must-read for anyone interested in enhancing their fund raising

among black college graduates. New and experienced fund raisers will come away with new ideas, perspectives, and strategies.

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