



**VISIONARY**  
Philanthropic Consulting, LLC

# Learning From Our Mistakes

November 2024

# Today's Agenda

- Welcome & Introductions
- Case Studies
- Audience Participation
- Questions and Conversation
- Happy Thanksgiving!

# Your Session Leader



## Jason Blumenthal

Principal

From an early age Jason was the guy that people called when they needed to “find something out.” Jason’s skill is in figuring out what the client truly needs, and getting it to them in an efficient easy to understand method.

In 2002 Jason formed The Fulcrum Group which has morphed into a full-service research, development proposal writing and management shop focusing on not for profits and hi net worth families. Jason was a founding member of Visionary in 2018. He lives and works in Minneapolis, Minnesota.

# Without a Seat at the Table

- *Client desired to serve on the board*
- *Organization wanted to attract and involve the "Next Generation."*
- *Then asked the mother.....*



# Appropriate Action?

- *Family makes naming gift for a school building*
- *Four years later the building is sold to a developer*
- *Family reads about it in the paper*
- *Institution says.....*



NOTE: This is NOT the institution in question. Pictures selected to make a point.

# Addressing your Donor

- *Year-end Giving Conversation:*
- *Requests separated into three piles:*
  - *Yes*
  - *No*
  - *Let's discuss*
- *In the "No Pile" an organization she has been supporting for 14 years*



	October 15, 2012
Annual Fund Leadership Committee	Mr. and Mrs. John Smith 10 Main Street Boston, MA 04321
<i>John Adams</i>	
<i>Michael Brown</i>	Dear John and Mary,
<i>Janet Davis</i>	We are blessed with generous alumni parents like yourselves who, even in the face of uncertain economic times, have remained unwavering in your support of our school.
<i>Elizabeth Murphy</i>	This is a very exciting time in our school's history. I'm pleased to report that through your support, we are transforming this campus. Because of your generous \$500.00 gift to our 2011-12 Annual Fund, we were able to offer tuition assistance to some very deserving students.
<i>Michael Noon</i>	As we embark on this new school year, we hope to make a high school education possible for more than 500 young men and women, many of whom would not be able to attend without your generosity. As proud parents of St. Paul alumni, we ask that you <b>consider a leadership gift of \$1,000.00</b> to this year's annual fund. By doing so, you can make it possible for future generations of students to share in the opportunities afforded your children.
<i>Joseph Oswald</i>	
<i>Ann Pryor</i>	
<i>Melissa Quick</i>	
<i>Steven Poor</i>	
<i>Mary Smith</i>	Sincerely, <i>Head of School</i>
<i>Thomas Thompson</i>	Mrs. Head of School

*John & Mary -  
So lovely to see  
you at the game  
yesterday. Wishin'  
Mark well @  
University this  
fall!*

# Thank your Donor

- *Year-end Giving Conversation:*
- *Count the interactions*
- *Count and categorize the communications*
- *The decision*



## Honor Roll of Donors

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# To Speak, or Not to Speak





# We just met and....

- *Follow up Email*
- *Assumption*
- *Premature Request*
- *Wrong Channel*



# Be Upfront....

- *Request a meeting*
- *Just catch up*
- *Call to confirm purpose*
- *Bait & Switch*



# Have a Clear Case....

- *Met with a Vietnam era, Retired Army Air Cavalry Captain*
- *Public University Business School alumnus*
- *Loyal donor*
- *Asked to help in "time of need"*



# Event Placement...And Conduct

- *It is always difficult.*
- *Event Seating and*
- *Enthusiastic Board Members*
- *If it is a Fundraising Event,  
Remember to Ask*
- *Unintended Consequences*



# Surprises Happen, Learn to Adjust

- *Working together for a year*
- *Capital Campaign Chair*
- *Meeting at Country Club*
- *Proposal is in the brief case*



# How to Close.... (Know when to hold'em)

- *Rehearse*
- *Presentation*
- *Ask*
- .....



# Know your Audience

- *Discovery Call or Feasibility Study*
- *Failed to do preliminary research*
- *Presented with an objection*
- *How to pivot*



# It Always Comes Down to Stewardship!

- 1. Client receives an email from a donor (\$50,000)*
- 2. Board member sends a daily update.*
- 3. Donor requests to remain anonymous and the board chair calls him out at the annual event*





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## Questions & Conversation



# Think Outside the Box

## Visionary Methodology™

### **Reexamine**

*Assess your strategies & approaches*

Dive deep to understand your donors' characteristics and key motivators.

Identify and leverage the most inspirational, effective, and relevant aspects of your mission and vision.

### **Reimagine**

*Innovate and find new ways to engage and inspire your donors*

Discover the tipping points of service efficacy and satisfaction to maximize campaign potential.

Define your relevance to the philanthropic community and communicate it boldly.

### **Realign**

*Adjust your actions to stay in sync with your mission & goals*

Deploy precious resources strategically and most efficiently to boost and amplify results.

Measure, monitor, and adjust as we collaborate with you to turn your vision into reality.



HAPPY  
*Thanksgiving*

# VISIONARY

Thank You!

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