



Approach your career like a major gift fundraiser, how to build your case for support with E. Ramone Segure

Season 1, Episode 3:

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Transcript

Speaker 1 (00:00):

Welcome to Asking for Good a podcast for people who want to make a difference, hear stories from seasoned nonprofit professionals and volunteers on how to begin or further a career and make world a better place.

Amélie Poojary (00:14):

I'm Amélie Poojary. I work with foundations in the us and abroad to make the world a better place. Welcome Ramone to Asking for Good. We are so lucky to have you with us today. You and I studied working together a few years ago at Columbia University, where you're currently teaching in the nonprofit management program. You've shared a breadth of knowledge and experience in fundraising with students for many years. Now, I'm curious if you could tell us how it all started, what got you into the nonprofit sector?

Ramone Segure (00:48):

First of all, I'm very pleased to be doing this with you and I absolutely have enjoyed and valued our working together. What inspired me as well as my road being in the field was through my childhood. And more specifically, my mother, my mother and father were active civically, but largely my mother during that time. And this was in Western, Pennsylvania and Pittsburgh. And she was involved with any number of organizations and really believed in being a community steward and participation and would carry myself, my brother and my sister around any number of organizations. And from that experience, we really learned philanthropy and volunteerism firsthand, and it really became a part of my, my DNA. And as I began my college study, these in thinking about what my next steps would be it was actually toward law school, but I was just really entrance with, and frankly in many respects trained in the nonprofit sector. And so that became my journey. And then now my career, and my love as

Amélie Poojary (02:03):

I hear your story, I'm reminded of the importance of philanthropy and community engagement in American society in general. And although philanthropy translates really differently in countries across the world, American fundraisers and non-profits are really seen as their experts here. You know, when it comes to best practice in the field.

Ramone Segure (02:27):

As you know, from our involvement and how what I say to my students in my class is that though we begin our chapters talking about philanthropy and its history. I indicate that the United States has no a corner of the market with respect to philanthropy. You know, I say, and in fact, it's true that since the beginning of humankind philanthropy, which is love of humankind and the way in which we proliferate and help each other and help communities is central to human beings around the world. So philanthropy is alive and well around the world. We do it in a unique way in this country. We have three sectors, the government sector, the private sector, and the not-for-profit sector in what we call as a civil society. And so it's ingrained in what it is that we do in the United States, this third sector, this independent sector or nonprofit sector, which is a balance for the other two. And it's so ingrained as, as owned by the people of this country, as we participate in philanthropy and in, in any number of different ways that isn't just giving of dollars, but it also is in the way in which we help others the way in which we embrace organizations. And in essence embrace our country.

Amélie Poojary (04:00):

Something else that I've heard you speak a lot about in class is capital campaigns. These are long term endeavors to raise significant amount of money across, within new streams. And it involves a fair amount of planning and a lot of skill sets.

Ramone Segure (04:20):

As well when it comes to the non-for-profit sector and organizations who have a mission and vision for where they're moving forward. The case for support is so essential because it's the reason for giving to the organization. And we present that to a prospects in any number of different ways, but we also have to have a plan for how we're going to get a, an individual gift, a collective gift a multiple year gift, a major gift as well as a planned gift. As we look at the giving spectrum up and down, the giving pyramid and one of the that we, we find in organizations as they develop their fundraising programs is the multiple year. The concentrated campaign that focuses on specific needs that the organization has. Those can be programmatic needs. They can be capital needs.

State can be endowment needs. But in essence, this is focusing an organization and those in constituency who are close to the organization, as well as those who will be giving to the

organization on really what the organization's strategic direction is. And therefore then that multi your campaign is aligned with that. And that campaign requires significant buy-in by the organization ownership by the organization committee structures within the organization and external volunteers also, and then stepped planning associated with the prospects that we identify, that we cultivate. And we solicit to basically get to our goals over that three, five, sometimes seven, maybe even 10 year campaign process. It, in my estimation takes into consideration with respect to what we do, but also our skillset. All of what it is that we bring to the fundraising enterprise and that we learn in the fundraising enterprise. I personally and professionally am very energized and excited by a multiple year capital and endowment campaigns.

Amélie Poojary (06:37):

Let's speak a bit more about an aspect of fundraising that can cause, you know, some anxiety in people just starting in this field or thinking of transitioning to, to fundraising. So this is the ask. Can you tell us about a memorable ask or gift that you you've had raise?

Ramone Segure (06:59):

Yes. I'd like to talk about that, but I think I'd like to introduce that by saying something about the ask. I recall several years ago, many years ago, actually I was in, in Boston and at a cocktail party and, and the number of folks who were involved in philanthropy and volunteerism were there to include college presidents. And I was speaking with a young college president from a private college that he ascended to from others in his family who were leaders in that organization. And he, he was so enthused by hearing my passion, talking about fundraising. And he said, Ramon, I have to admit to you that I'm very afraid to raise money. And I just can't do it. And I said to him, well, with all due respect, you're in trouble.

And the reason why I said that was because he's with a private college, he was with a private college and that essentially he's gotta really raise money. And I said to him that over these last 10 minutes that we've been conversing, I've been so excited to hear about your institution, what it does, what your thoughts are in, in your vision for it. And I said that in essence is fundraising. That is the ask. I said that you should consider really the ask to be secondary or tertiary, because it's really you talking about and expressing your love for the institution, your passion for the institution, what it does that really generates support for the institution. And so it's from that that I will go to now an experience that I've had that really stays with me significantly. And I think about a gentleman at an organization that I met oh two years into my being there.

And I was there for about seven years. And he had only been giving minimally to the tune of about \$500 a year. But I met him when I was giving a tour of our new research center. And it turned out that we also were Eagle Scouts in pads. So when I talk about the ask or major gifts, they're about relationships, frankly, all the fundraising is, but it is valuing the person making a connection with the person and a trust index also associate or trust proposition also associated with how you engage. And so we became trust partners. We became valued partners in our conversation. I was able to see through him what his allegiance was and his history was with the institution. His mother was a volunteer. She took him much like my mother took me to organizations.

And so he became familiar with the organization. And so he wanted to hear more. And we were developing a research campaign and a love for him was also research. But we started small. We started with a, an annual gift that we moved up to a thousand dollars, then \$10,000. Then he named an area or a room of the, of the institution for his mother. That was basically the volunteer site where she had worked. This then led to, as we were completing the research institution, a research Institute, it led to the need for gifts associated with research associated with rooms associated with anything to be moving forward. And it led to a \$500,000 gift from him that was targeted for research. And as he did that, I knew that he was also interested in legacy, not from the standpoint of, of namesake, but for the standpoint of really helping the institution and others to see that he and his mother and his family had some lineage tied to the institution and it was encouragement for others to give.

And so, as he and I were involved in our relationship and we'd go to lunch from time to time, we were seated in a restaurant that was literally across the street from the research Institute. There were floor in that building five floors that would be named for a million dollar gift, and two floors were left to be named. And one was a floor associated with with research, more specifically bench research. And I said to him, I don't know about all, about your finances and your plans for the future and your ability, but I do know what you've been doing. I do know about your belief in life. And I'm not saying this to you because I wanna pull money out of you. I'm saying this to you, because what I'm about to say to you has come into my head and thinking that this might be of value to you and your family.

And I said, you've given \$500,000. We could combine that with another \$500,000 that you could pledge over the next five years for then a total of million dollars. And we could put your family name on the research floor, a specific bench research floor in the building over your show, older, he almost cried. He, he said, can I really do that? And he said, if that's possible, I would love to do that. That actually became not only his name and the family's name on that floor, but all also started the first research endowment at the institution that

his name is on. And it's now also led to another endowment that he has set up for innovation grants, for innovation and research. I get chills just thinking about the history of our relationship, what that has done for him, what it's done for the institution, what it's done for his family. And so that's the story that I would, I, I, that I share with you, and I thank you for asking,

Amélie Poojary (13:47):

That's such a great story. And I'm also, I was also listening. We've, <laugh>, we've choose as well because it's, it really speaks also of the importance of knowing, you know, what drives the donor and and really the, the partnership partnership involved in, in, in fundraising. So thanks so much for, for sharing that and for giving us all the details, but the ask, we could almost feel we were with you in that, in that room after asking for this gift, how did you keep the donor engaged on, on the long term? Could you, could you speak a bit about that?

Ramone Segure (14:36):

Stewardship is so essential to what we do in the, not for profit sector and in our nonprofit organizations it is unique from the sales encounter that one has in the private sector. And this is not to, to cast dispersion at all with respect to the private sector, but we know that there are specific kinds of units in operation, in the private sector where you might have an engagement around a specific product, and then, you know, it move moves over to that's a sales team. And then, you know, it's very different in terms of how you might engage that organization moving forward. But in the, in the, not for profit sector, that relationship that I talked about earlier provides a connection between the organization and that donor, but also between the person who's developed that relationship. And in that we have a responsibility of stewarding having the donor cradled in our hands, and basically continuing that relationship that care and feeding moving forward.

One thing that it does, it absolutely endears strengthens the relationship, but provides ongoing and greater information for that donor moving forward. But it also provides that kind of relationship that comfort for that donor to provide then their next gift, major gift, and likely even a planned gift, which is the ultimate gift. Stewardship takes multiple forms. It can be simply for example, a gentleman that I mentioned who gave the million dollar and they met floor. He and I were together last Thursday evening at an event. It could be something such as that it could be sending a holiday card, it could be sending a birthday card it could be inviting the person or organization to an event or events. It's your organization. It could be sending a link to an article that, you know, that they would benefit from or enjoy I've even sent as I've traveled or in my walks or whatever I've sent books to, to donors that I know that they would really value.

And sometimes it's just checking in, you know, how are, how are things going? And this stewardship, by the way, should not take place just with donors or prospective donors. It should also take place with our volunteers and our board members. We also have to steward them. We must also stay in touch with them. We may get, we must get to know them and spend the kind of time that's important for that ongoing connection and relationship. Now, when you hear this, you might say, well, this can take time. There's no question, but that it takes time, but you heard me say earlier about valuing the person. If we think about our personal relationships or our, our, our family and our, and our good friends, we maintain those relationships. And that's in essence with stewardship is in the no profit sector.

Amélie Poojary (18:06):

I would like to go to questions for, we are job seekers. Now, I'm particularly curious if you could share some advice to people who want to know a bit more about securing major gifts.

Ramone Segure (18:19):

I'm going to talk a bit about securing major gifts, but I'm also going to talk about career development, both seeking the major gift. I've begun to talk about earlier, and it is doing one's homework and research, and it's the same with a career seeker. I think it is very important to know one's self, to know your strengths and weaknesses, and you are assessing also the interests involvement, activities, and ability of those who would be making those gifts. So doing homework, that is an assessment of your strengths and weaknesses, and what you have to offer from the institution helps you with the major gift encounter, and ultimately the, what we call moves management process. That takes us along a process that might be in an instant. It might be in a week, and it might be over two months, might be over a year.

It might be over two years of the steps that are required, that you are thinking about that are important for you to ask for that gift through the right person at the right time, at the right level and for the right purpose. And when we think about career, it's very similar in that we're knowing ourselves to the best of our abilities. We're knowing the marketplace and we're knowing where it is that we are wanting to go and then organizations that fit into that. But it's so important to know the value that we bring. So when it comes to careers, I think that quite often individuals might think about it's the job that I'm seeking. Do I have the requisites for that? And therefore I'm a good match. It's more than that, essentially. It is what will you provide the organization? How can you help them to fulfill their needs?

How will, what you do for the organization continue to challenge you and to help you grow. And you see that also in a Sightline associated with where you are headed in your career. And it's not a negative to think that that what you're going to be doing in that next career step it's you're, <affirmative>, you're not being out of allegiance with that, by thinking about what you might be doing five or 10 years, even beyond now, I would say to career seekers that in addition to taking on, a set of themselves, it's very important to communicate who you are so much like in fundraising, the case for support, which can be articulated in a document, in a brochure, in a, in an elevator speech, oh, over 30 seconds or 60 seconds or 90 seconds is exactly what you're also developing for your career. So it's your case for support for who you are and how you describe yourself.

That then translates into cover letter that is associated with what you're going to be doing for the organization and translates into your resume. That demonstrates that. Now, how do you find out who you are? I'm gonna recommend two books for, for individuals. One would be, what color is your parachute by Richard Boles, B O L L E E S, and is targeting a great career by Kate Wende, w E N D L T O N. In both of those texts, I strongly recommend that you read them cover to cover in one or the other. And the exercises, the exercises initially take you to going through your own life history. And ultimately that's going to define who you are. It's going to help you align with your skills, et cetera, that lead you to a specific, a position or positions that you're seeking. And also how you translate that into, as I've said earlier, the language of written documents, as well as oral speech that presents who you are.

And I would say also, don't be overly concerned with you and your background, being an exact widget fit of the organization. You can have, and do have transferable skills that can lead to other kinds of opportunities. Perfect example would be myself. I've spent the last seven and a half years working in healthcare, helping an academic health center to raise money and to develop its teams and to develop the organization. And I've transferred and translated that skill into now health, an international humanitarian organization for women in leading the operations in the United States and advancing our brand internationally. So those are the things that I would say that kind of mesh between what we actually do in our field, such as in major gifts, but also what we do as we March through our life and life's experiences and our journey of, of career.

Amélie Poojary (24:32):

I am myself transitioned to fundraising, and I was thinking about the flexibility that this sector gives you of working for very different kind of organization. I also wanted to ask you

another question that students often bring up it's what advice would you give to someone wanting to start their own nonprofit?

Ramone Segure (24:58):

Oh, well, the advice is, and not so much advice, but it's recognition of their passion. As I've talk with students and actually heard from students or others about what their passion is as it relates to helping human beings and not necessarily just human beings, but helping others, but it really starts with passion. What happens is that as you're developing an organization, you are seeking and you're required to seek investors and investors are also stakeholders more specifically who believe in what it is that you're doing, align themselves with what it is that you're doing, feel your passion, and know that you're going to be dedicated to it. And therefore they are possible candidates for serving on your board, which is required. You also, in thinking about the stakeholders, you also need to be thinking about those who are going to be making gifts to your organization and ideally anchored gifts to your organization, those major gifts, and those tried and true gifts that are going to see your organization through those early and ongoing you years.

It's important to also assess your own skills skillsets and what you need when it comes to an organization and developing it, you're going to need to know and have an understanding of governance requirements, such as the board, as I just mentioned, and any other kinds of legal requirements associated with setting it up and having it operate on an ongoing basis from a financial standpoint and how the books and reports are developed, but you also are going to have to have operational support those who can help to manage the organization. Maybe it's going to be an organization without walls, but if it is with walls a facility, it, it cut with other kinds of requirements and needs. You're also going to need programmatic people or in persons who align themselves with and understand and own the programs that are associated with what you're offering in the nonprofit organization.

You're going to have to cover the development, the fundraising associated with it, maybe you or the founder of the organization would largely be, or even exclusively be doing it. You always have a responsibility associated with that, but those are the key staff positions and key fundamental development operations associated with the governance structure and board structure of the organization. But above all above all, it really is your passion, your clear vision for what it is that you want to do, and for what that organization's going to do to impact our society moving forward.

Amélie Poojary (28:26):

I'd like to ask you a final question about diversity, equity and inclusion. So how is that part of your work at the organization you are, you are with now or an organization you you've been volunteering with?

Ramone Segure (28:41):

It's an important question today for these times. And I would like to submit that it would be, and would've been an question throughout the, the, throughout the life of, and lives of human beings. It goes to what we're talking about at about major gifts and generally the philanthropy it's valuing the person, whether they're employees, whether they're prospects, whether they're donors and it, it goes to equity also. So by way of example, as I've been in this field now for over 40 years I've lived in and seen a time when diverse individuals to include females. Gender issues also were not welcomed and included. There became an evolution much like in the private sector where a recognition of markets that had not been included and were ignored, meaning that not only was it a value to diverse groups in the purchase of products or in being involved in the, not for profit as a volunteer board member or donor.

But it, it also was bringing in resource in the private sector, in the government sector and in the not for profit, however, figuratively organizations were scratching their heads years ago about how to do that, how to, to make themselves more diverse and to value others, because there were challenges associated with having persons of color or females or whatever be involved in cultivating stewarding, and being assigned to prospects that were not diverse. So there's been growth in this, but challenges also with diverse persons finding even positions in our field, this has absolutely evolved and changed, but now over the last year or so with the challenges associated with the death of George Floyd and the awakening that's, we've exp areas in the country, and certainly in the world, there is now dedication to de and I diversity equity and inclusion and people and organizations understanding the value of inclusion.

The, the value of equity, we in women for women international have recognized this for some time because of the focus on women and the challenges of gender equity there, and power issues associated with women and control of women around the world and where we work in conflict and more or situations. But we also are now with the advent of de and I, for the circumstances I've mentioned over this last year are really taking a closer look at really what that means and how this can truly be implemented and be believed and become a part of our DNA, not only organizationally, but also with respect to the individuals who work in the organization. This is really about if we don't consider this to be a negative, it's really about shared power. It's the power of agency that we each have as

individuals and that we have as societies and certainly countries and persons in those countries.

As we work with us around the world, it's very important to be focusing on this in the, not for profit sector and in our career space because it, it does bring in more persons brings in more opportunities, helps the organization to grow, helps individuals in the organization to grow and helps to advance our, our societies. It's a very interesting time that we we're living in the pandemic coinciding and creating some paradigm shifts in the way in which we engage the way in which we interact. And and now the intersection of de and I, I think it's a very healthy and good time for all of us in the sectors in the country, in how, in which countries operate in around the world. And, and definitely in the fundraising, the development the not for profit space,

Amélie Poojary (34:02):

Ramon, thanks so much for giving us a glimpse of your day-to-day efforts and impact in philanthropy and also all your good advice and thoughts on how the sector is and can move forward. It's always so inspiring to hear about the important work you do. Thanks again so much.

Ramone Segure (34:23):

Thank you for having me. And again, I continue to be pleased with and value our working together and look forward to more of that in the future. Best wishes.

Speaker 4 (34:36):

Thank you for joining us on asking for good find wherever you get your podcasts. And please tell a friend, take care.