HOW TO SCORE

Your First

OR NEXT

Million-Dollar Gift



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Magic Moments:
First Million Dollar Gifts

Friday, December 4th, 1998, seems like yesterday to me. At 11:15 a.m. I was in the Dean's Office in the College of Business at The University of Texas at San Antonio (UTSA). For the first time in my career, I had just asked for a million-dollar gift … and the response was YES! I wanted to shout for joy but restrained myself as my boss just tactfully blinked at me.

The donor was an odd choice to become the first million-dollar donor in UTSA history. Richard S. Liu, Founder of Superior Leather, in Hong Kong, 8,269 miles away from San Antonio. But his gift to UTSA made perfect sense. In 1974, Dr. Jim Gaertner, who would later become Dean of UTSA's College of Business (and my boss), was Controller of Tandy Brands in Yoakum, Texas. That was the year that Richard made his first trip to the U.S. and his first big sale to Tandy Brands — a sale that he never forgot. Jim and Richard developed a friendship that grew closer as their career paths progressed. As Richard's company became one of the leading leather manufacturers in the world, he began to become a generous philanthropist making gifts to prestigious institutions such as the University of California-Berkeley.

One day in the summer of 1998, Jim stepped into my office and for the first-time mentioned Richard and his exciting gift capacity and demonstrated philanthropy. We decided to craft a million-dollar proposal to fund student and faculty exchanges between UTSA and prominent universities in China. Richard scheduled a trip to San Antonio. At that point, I didn't know what to expect. While he had been generous to other institutions, he had never given a penny to us. But now, we were going to ask him for more than just pennies. I had watched Jim on dozens of occasions ask for much more modest amounts, but this time he was inviting me to do the ask. His reasoning was that a successful seven-digit solicitation would do more for my career than for his. He was absolutely right. After his first million-dollar gift, Richard subsequently made gifts to UTSA totaling $5 million.

My next million-dollar solicitation could not have been to someone more different. Dr. Janice Mendelson, a distinguished retired Army colonel and surgeon, had been making modest gifts to my next employer, Our Lady of the Lake University, a small Catholic institution in San Antonio. Almost everyone thought she was just eccentric. Characteristically, she would always come to meetings

with miscellaneous paperwork stuffed in plastic supermarket bags. She lived an incredibly modest life in the same small apartment for 20 years and drove an older model Toyota Corolla. Her passion was for folk dance and its capacity to bring people of diverse backgrounds closer together. In fact, during her service in the Vietnam War she organized folk dances.

Janice didn't believe in calendared meetings keeping to a strict schedule. Discussions with her just wandered aimlessly. Everyone reminded me that this was Janice just being Janice, and I should not take her seriously. Unfortunately, I believed them – until one of my friends and colleagues, Gloria Urrabazo, met with Janice after I did. Gloria cautioned me against jumping to conclusions, insisting that Janice deserved closer attention. I realized it was necessary to meet Janice in unrushed settings, such as early Saturday evening dinners at her favorite diner. (It helped that she took a strong liking to my wife Andrea.)

Slowly but surely, I earned her trust, and a major gift became a possibility. We realized that serious discussions needed to be conducted with her attorneys but without Janice present. We hammered out a multi-part $2.2 million gift agreement in 2005 composed of three components: current dollars to fund a folk center program, an endowment to continue support of the folk center program in perpetuity, plus a $500,000 unrestricted gift (which would be primarily used to establish athletic programs that played a huge role in reviving enrollment).

Unlike my role in asking for the gift from Richard Liu, this time I had the opportunity to play the primary cultivation role in building the friendship and securing the gift from Dr. Mendelson.

When I became Executive Director of Alamo Colleges Foundation in 2009, the potential of a major gift from Kerrville businessman Neil Griffith had been lingering for too long. He grew up poor as one of 10 children in

Arkansas and was able to attend college on the G.I. Bill. This changed the direction of his life, and he never forgot it. In getting to know him better, I also learned Mr. Griffith couldn't stand waste. I vividly recall that one day as I was walking with him to his car, he expressed the need to return to the office to pick up a yellow pad, which turned out to have just one sheet of paper left on it. Knowing his characteristic of being thrifty would be valuable as I moved forward in making the ask.

But talks progressed at a snail's pace. Mr. Griffith was very interested in funding an endowed scholarship for a new satellite campus in Kerrville, about 60 miles west of San Antonio. I was never scared of writing assignments and bringing them to fruition to the satisfaction of all those involved. So I decided to pack up my laptop and hold a series of face-to-face meetings with Mr. Griffith's designated representative, John Spikes. Section by section we discussed the contents of a five-page gift agreement. At the end of each session, Spikes would review our progress with Mr. Griffith.

In 2010 we came to an agreement on a $1 million endowed scholarship, and I finally had the opportunity to meet Mr. Griffith at the opening of the Kerrville Center. As is sometimes the case, we encountered difficulty finding enough students to apply for and receive a scholarship. To move forward, I was able to begin a personal relationship with Mr. Griffith as we discussed possibilities to loosen restrictions on scholarship criteria. He informed me that he was going to give us another $2.5 million and wanted discussions on how best to allocate and spend the money. His first request was to add another $1 million to the endowed scholarship fund, keep in mind that we were experiencing challenges in awarding just $1 million. So we then held several face-to-face meetings to discuss possibilities for the best use of the remaining $1.5 million.

The Kerrville area is home to major hospitals with a strong demand for health care professionals, especially nurses, so he agreed to commit $750,000 to construction of new facilities for nursing programs. Recognizing the huge value of flexible unrestricted funds, we were able to convince him to commit the other $500,000 to an endowed fund to be spent each year at the discretion of the Kerrville Center Director. In February 2017 we announced this $2.4 million gift — a new record for Alamo Colleges Foundation.

Fundraisers, particularly in the area of leadership gifts, achieve the greatest impact not by the gifts they solicit themselves, but how they leverage the relationships and abilities of others on their professional teams and boards. A terrific example is my experience with a $1 million gift Alamo Colleges Foundation received from the indomitable Harvey E. Najim, one of the most energetic forces for doing good I've ever had the pleasure of meeting. At the heart of his philanthropic personality is a genuine affinity for the underdog. He enjoys connecting with people from all walks of life, particularly those who directly benefit from his gifts. He understands and respects them. He has a laser-like focus on children's needs, especially for food, shelter, clothing, and medical treatment. He has a passion for the promise of education.

Harvey is a classic self-made American success story. Discovering the power of computers, he went on to build Sirius Computer Solutions into a $1.7 billion corporation. His philanthropic jumping-off moment came in 2006 after a Private Equity Transaction, when he launched the Harvey E. Najim Family Foundation (now named Najim Charitable Foundation). He's enjoyed giving away money more than making it. It's challenging to keep up with his philanthropy which, between personal and foundation giving, is approximately $200 million, and he is making plans for that total to reach $250 million.

My major gifts officer, Deborah Martin, the best hire I ever made, played the pivotal role in working closely with Harvey culminating in 2016 with a $2 million gift (including generous portions for four-year institutions) establishing the Harvey Najim Pathways Scholarship. This empowered some 200 low-income students (50 per year over four years) to begin their higher education journey at a local community college then transfer to local public universities to earn baccalaureate degrees and earn jobs in Information Technology, Cyber-Security, Nursing and Health Professions. The return on this philanthropic investment is exciting careers for San Antonio students and estimated at contributing $10 million to $12 million each year to the local economy. This innovative initiative was very much of Harvey's hands-on design. Deborah was the primary resource in furnishing Harvey with much-needed research and data to design and implement a successful program.

Harvey and I nurtured our friendship through this partnership. Since then, Harvey emerged as a cherished mentor and reservoir of support as I pivoted from practitioner to fundraising trainer/consultant. In fact, he was the first person I met with when developing plans for this career transition. He generously shared his time to speak at five live gatherings and/or webinars, some attracting overflow audiences of more than 150 non-profit leaders. I would not have attained my position in the fundraising world without the visibility and rich guidance he provided.

In his latest chapter he continues serve as chairman of the board but has turned over the day-to-day leadership of the foundation to his long-time executive director and chief operating officer so he can devote more time to mentoring students in the Najim Center for Business Innovation and Career Advancement at UTSA. He is also writing a book to share the insights gained from having built from scratch a leading technology company, and the many lessons he's learned from being a change agent in the philanthropic world.

It needs to be emphasized how vastly different the personalities of these four donors were who made record-setting gifts to each of my employers. Their backgrounds, motivations and philanthropic visions were different. They required different strategies and approaches to arrive at consensus. The common denominator was meeting the donors where they were, listening closely, always keeping an eye out for clues, and being sufficiently patient and providing the time to make crucial decisions. Donors are unique and require their own cultivation, solicitation and stewardship techniques.

How to Score Your First of Next Million-Dollar Gift **by Jim Eskin**
is available for purchase on Amazon.
Print format ($16.95)
Electronic format ($5.99)
Quantity discounts available.

Contact the author at jeskin@aol.com.

If someone paid you $1 million for your home despite its condition, that's exactly what it would be worth. The same is true when your non-profit earns its first or next million-dollar gift. Everything changes in the way you are viewed. No matter how long it took to receive that first million-dollar gift, you can be assured that the next one will come much faster. Million-dollar gifts happen every day as part of American philanthropy's vast $557 billion enterprise, and this book will prepare your staff, board and volunteers to discover, cultivate, solicit and steward first and next million-dollar gifts.



Jim Eskin spent more than three decades in fundraising, communications and public affairs before launching Eskin Fundraising Training, LLC. His webinars, podcasts and virtual training sessions provide the coaching and support services non-profits need to compete for and secure private gifts. He has published hundreds of articles in print and online and conducts webinars, podcasts and TV interviews on topics of interest to professional fundraisers, volunteers and donors. Since 1996, he has published *Stratagems*, a free monthly e-newsletter exlporing timely issues and trends in philanthropy. He is the author of *10 Simple Fundraising Lessons*, a common-sense guide to overcoming your fear of asking for gifts.