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THE SPIRIT OF PHILANTHROPY

“Through his stories and summaries, Frank Pisch distills the enduring truths about fundraising. The Spirit of Philanthropy will be both needed and appreciated for decades.”

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**FRANK PISCH** As founder of The Compass Group, Frank Pisch has more than forty years of results-driven fundraising experience, securing more than \$4 billion in philanthropic support for nonprofits. Frank has advanced the missions of hundreds of organizations through capital campaigns, major gift philanthropy, strategic planning and fundraising counsel.

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PISCH THE SPIRIT OF PHILANTHROPY

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THE SPIRIT  
OF  
PHILANTHROPY

*Fundraising for a Better World*



FRANK PISCH

*“The two most important times in your life are the day you are born and the day you discover why.”*

— MARK TWAIN



## INTRODUCTION

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Over the years, I’ve told many people, “I have the greatest job in the world, because I get up every day and go to work with people who are trying to make this world a better place.”

This is a book of thoughts on how I view the profession of fundraising consulting, the philosophy that I think is important, and the values that are imbued in the work of my company, The Compass Group.

I’m not a fundraiser; I’m an experiential educator. I don’t fundraise for clients of The Compass Group; I teach them how to do it well so they can do it on their own. As a matter of fact, my first job was as a teacher.

### *Powerful Inspiration*

In the early 1970s, I graduated with a BA degree from the School of Education at the University of Connecticut and got a job teaching Biology and English at South Catholic High School in Hartford, Connecticut. While in that job, I was inspired by an article called

“Walkabout” by Maurice Gibbons for *Phi Delta Kappan* magazine in 1974.<sup>1</sup>

This award-winning article would serve as a guidepost for my professional life.

It was the story of Aborigines in Australia and how they determined whether a young person in their tribe was ready to be considered an adult—a contributing member of their society.

As the story goes, the elders of the tribe would send a teenager out on a forty-day walkabout into the forbidding Australian outback. If that young person survived and returned safe and sound, he or she had proven they had what it takes to be a contributing member of the tribe. This story emphasized the vital importance of determination and self-reliance in Aboriginal culture.

The article brought several questions to my mind: What factors would determine if an individual was a contributing member of society in our culture? What skill sets are needed to achieve that status? How do we acquire those skill sets?

## *Adventure Challenge*

I set out to find some answers. I became involved in discussions with a number of experiential educators: Dave Mellen, creator of Experience It; Sister Maryann Hedaa, an experiential educator who developed a program at St. Mary’s Academy called Adventure Challenge; Keith King, who operated LIVE (Learning in Vigorous Environments) at Keene State College; Josh Minor, Joe Nold, Peter Willauer, and John Huey with Outward Bound; Paul Petzoldt, Founder of the National Outdoor Leadership School; and a variety of professionals with the Association for Experiential Education.

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<sup>1</sup> Maurice Gibbons, “Walkabout,” *Phi Delta Kappan* (May 1974).

With the help of those experts, I identified three essential skills for becoming a contributing member of our society: the ability to learn, the ability to relate to others, and the ability to make responsible decisions. This led to the founding, incorporation, and funding of the Adventure Challenge School in Manchester, Connecticut.

Adventure Challenge was based on three principles:

- » Students would get a hands-on approach to the subjects they learned in class so they could make the connection between academics and experience—the beginning of a real education.
- » Students would participate in an adventure experience—backpacking, camping, rock climbing, caving, sailing, or an urban immersion—to challenge themselves, build self-confidence, and learn to work as a team.
- » Students, as a group, would participate in a service project in their hometown to give back to their community.

The Adventure Challenge School was a very popular and successful program back in the ’70s. It was featured in local newspapers and on local and national television. In spite of this success, the board of Adventure Challenge closed its doors in the early ’80s because the school ran out of money.

## *A Commitment to Fundraising*

I was stunned and disappointed by the closing of Adventure Challenge, and I decided that no nonprofit worth its salt should close because of a lack of funding. It was clear that fundraising was a skill I needed to acquire.

While running Adventure Challenge, I was awarded a fellowship to Antioch New England Graduate School, and I obtained a master's degree in organization and management, specializing in nonprofit institutions. This gave me the opportunity to do pro bono work for the International Center for Endangered Species in Newport, Rhode Island, where I ran into a man named Ralph Peterson of Ketchum Inc. Headquartered in Pittsburgh, Ketchum was the largest fundraising consulting firm in the world.

**No nonprofit worth its salt should close because of a lack of funding.**

Ralph introduced me to fundraising consulting “Ketchum-style.” The company focused on helping nonprofits obtain the resources they needed to fulfill their missions and ensure their sustainability—exactly the skills I was looking for. When I accepted

an offer to join the firm in 1984, my entire career path changed.

Working at Ketchum was a revelation. I spent my days with the team who founded the profession of fundraising consulting, and they taught me how it's done. It wasn't easy. Ketchum put me through an intense training program of classroom learning, then sent me out into the field with a veteran consultant.

## *On-the-Job Training*

The classroom learning was important, but at Ketchum, you learned mostly by doing, working on-site at a client's location day after day, and gradually being given more responsibility.

One of the first clients I worked with was a YMCA in Framingham, Massachusetts, under the tutelage of Jeffrey Wolfman. I went on

to consult at Wilson College, a small, private women's college, then to large public universities such as the University of Minnesota, where I was part of the largest fundraising campaign any public university in America had undertaken.

My experience at Ketchum gave me direct exposure to the business of fundraising and the skills and confidence to be a hands-on fundraiser for several nonprofits: Berry College in Rome, Georgia; the Association of Governing Boards of Universities and Colleges in Washington, DC; and the Baltimore Symphony Orchestra.

Although the time I spent as a fundraiser deepened my understanding of philanthropy, consulting was often in my thoughts. I craved the opportunity to combine what I was learning every day with who I was as an educator to help nonprofits across the country.

With this in mind, in 1997 I returned to consulting and rejoined Ketchum, which was under new ownership and headquartered in Dallas. I believed I could be part of taking the company to a whole new level, and I was excited to work again with the professionals who stayed with Ketchum through the transition.

## *A Better Way*

During my second stint with Ketchum, I thought there had to be a better way to advise nonprofits on fundraising. I envisioned a model that put consultants and clients side by side, working in partnership to customize fundraising programs and craft strategies to meet the specific needs of nonprofits.

For me, the priority was teaching clients how to fundraise on their own. As we strengthened their ability to accomplish the day-to-day tasks of fundraising—and boosted their confidence—we would build their capacity as fundraisers.

Ideally, when our time with an organization ended, they wouldn't need us anymore—our goal would be to educate them to the point where we put ourselves out of a job.

This philosophy inspired the founding of my own company, The Compass Group Inc. As Compass grew, I envisioned a series of “walkabout goals” for our clients:

- » They create aspirational visions for their organizations.
- » They build the capacity to be sustainable over time.
- » They build teams that are invested and engaged in fundraising.
- » They create lifelong relationships with their donors.
- » They make a difference in the world.

I continue to be committed to teaching, mentoring, and coaching nonprofits as they work to achieve these goals.

## *The Power of Storytelling*

As an educator, I've often explored ways in which different lessons can be taught and learned. I've discovered storytelling can be effective, interesting, and fun if the student is willing and engaged. I assume if you're reading this book, you're willing and engaged, so I'm going to rely on storytelling to share my perspective.

But please keep in mind the stories in this book are mine. They're my personal recollections of people I knew and situations I was involved in during my career. I've tried to be as accurate as possible in relating these stories, but in the end, they are my recollections.

*“Philanthropy, charity,  
giving voluntarily and  
freely ... call it what you  
like, but it is truly a jewel of  
an American tradition.”*

—JOHN F. KENNEDY



## CHAPTER 1

# THE SPIRIT OF PHILANTHROPY

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Philanthropy isn't about money.

You might be surprised to hear me say that. After all, I've been either a fundraising consultant or fundraiser for more than forty years, and I've secured more than \$4 billion in philanthropic support for nonprofit organizations. Throughout my career, however, it has become clear: *Philanthropy is about inspiration and impact.*

### *Inspiration and Impact*

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*“Giving is not about making a gift, it's about  
making a difference.”*

—Kathy Calvin, CEO,  
United Nations Foundation

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Philanthropy is often inspired by visionary leaders. Here's a story that will show you what I mean. The Boys Industrial School in Mount Berry, Georgia, was founded in 1902 by Martha Berry, whose vision was to provide education for poor boys in Northwest Georgia. When Martha visited the home of inventor Thomas Edison and his wife Mina, the course of the school changed forever.

Edison introduced Berry to entrepreneur Henry Ford. At that time, Ford was the richest man in America and the richest industrialist in the world. As Berry described her vision for Berry College, Ford became intrigued by the fact that students at the school not only received an education but gained practical, hands-on life experience: they built their own dorms and classroom buildings, plowed the fields,

grew their own food, and held jobs to work their way through college.

Ford envisioned the under-privileged students getting a great education, landing good jobs after graduation, and improving not only their own quality of life but also their struggling families' as well. The first gifts he made to the school were tractors and a truck.

Ford wanted to help Berry pursue her mission to give students better lives, and he had the financial means to do so. Inspired by her vision and dedication, he donated \$6 million to the school in the early 1920s. A staggering sum in those days, it allowed Berry

Rumor has it that Martha Berry was quite creative in her efforts to engage and cultivate the Fords. Local residents tell tales of fresh-baked apple pies delivered hot from Berry College to the Ford's train every time it stopped in Rome, Georgia, for fuel and water, en route between Michigan and Florida.

to buy twenty-nine thousand acres of land, making the school the largest college campus in the world.

Ford then brought in Italian masons to build magnificent stone buildings on this land—now known as the Ford Campus—and he was instrumental in the construction of the Water Wheel at the Old Mill. In 1926 the Boys Industrial School became Berry College, where those landmarks still stand today.

Ford was inspired by Martha Berry and her vision. He believed in her and saw a role for himself in making that vision a reality. He was inspired to make a difference that not only transformed the campus and the students but transformed him as well.

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*“What the Fords gave of themselves was worth more to the schools than what they gave of their means.”*

*—Martha Berry*

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Philanthropy can also be inspired by a visionary donor. Take the story of the Davis United World College (UWC) Scholars Program. Inspired by the United World Colleges movement—which brings students together from all over the world to live and learn during their last two years of high school in one of seventeen locations on five continents—Shelby Davis and Phil Geier created the Scholars Program based on a single idea:

If you could bring thousands of talented students from every corner of the globe to US colleges and universities, you could create international understanding and change the world.

This idea reinforced Davis's personal and professional experiences and inspired a vision for impacting the future. He explained: "When I started my business career, I took my own history lesson from Princeton: I learned how leaders make a difference, in their countries, in their centuries. So I invested in leaders, and that investment helped me to be successful. I'm looking to invest again in leaders of the future."<sup>2</sup>

Today, the Davis UWC Scholars Program partners with nearly a hundred US colleges and universities to provide annual grants that support need-based scholarships for each matriculated UWC graduate for up to four years of undergraduate study. It's currently the largest undergraduate scholarship program in the world. And Shelby Davis invests \$40–\$50 million per year to advance his vision for world-changing leadership.

## *Reasons for Giving*

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*"In the first thirty years of your life, you should learn, the second thirty years you should earn, and the rest of your life you should return."*

—Shelby Davis

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Donors give for a variety of reasons. Some strongly believe that it's simply the right thing to do. Some believe it's their moral obligation

<sup>2</sup> Shelby Davis, "Why UWC," September 23, 2017, <https://www.davisuwcscholars.org/founders/vision/shelby-davis-explains-why-uwc->.

to support organizations that serve humanity or the environment. Some donors, who have benefited from the philanthropy of others, give to "pay it forward." And others give because it's family tradition.

Regardless of their motivation for giving, the one common thread I've found in my interactions with donors is inspiration and impact. Donors want to be inspired to give to nonprofits that have an impact, and, now more than ever, donors want to be engaged in an organization's mission. They want to feel they're an important part of it, and they want to see how their contributions make a difference.

In Martha Berry's vision for Berry College, Henry Ford found values that reflected his own, and by investing in her vision, he fulfilled his desire to perpetuate those values.

Shelby Davis and Phil Geier created their own vision for the UWC Scholars Program that was embraced by their US higher education partners. That inspiration, combined with the financial means to have transformational impact, helped to make education, as Shelby and Phil put it, "a force to unite peoples, nations, and cultures for peace and a sustainable future."<sup>3</sup>

When a donor feels connected to an organization's mission and sees that their support made great things happen, he or she has given what the Ketchum folks used to call "money without regret."

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<sup>3</sup> Ibid.



## The Magic of Hard Work

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“Great things come from hard work and perseverance. No excuses.”

—Kobe Bryant

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I always keep in mind that fundraising is a service profession.

Fundraising isn't a job, and it isn't a career—it's a lifestyle. It's a life of service, obligation, and stewardship. Fundraisers give themselves over to missions, values, and goals that are bigger than they are. They make the world a better place by providing resources for institutions that educate, heal, inspire, and help people. I'm fascinated by the magic they create every day.

**Fundraising isn't a job, and it isn't a career—it's a lifestyle.**

There can be magic in fundraising, but it's magic that occurs only through hard work, preparation, and planning. Many people aren't aware of this. A few years ago, after conducting a successful \$5 million solicitation, a dean at a major university medical center said to me, “That was easy. What do I need a development office for?”

After I showed him the thirty-six-month cultivation plan that the university had implemented to develop a solid relationship with the donor—a plan that put the donor in a position to say yes when asked—he began to understand the huge amount of hard work that went into his moment of success.

Fundraisers stand at the intersection of inspiration and impact. Through hard work, they provide opportunities for organizations and donors to come together in *the spirit of philanthropy* to make a difference.

As a fundraising consultant, I'm proud to stand shoulder to shoulder with fundraisers as they work to make the world a better place. They spark the spirit of philanthropy, and that spirit is embodied in a well-planned, efficiently executed fundraising campaign that is a seamless blend of art and science.