

The Good, The Bad and The Ugly

Partners in Philanthropy, LLC
Louise Rosarbo Dinsmore
Cheryl A. Comai

Our Panelists

Robert Beagle

- ▶ Vice President Advancement, URI, 1991 – 2012 (Retired)
 - Completed five successful fundraising campaigns
 - Provided leadership for URI's "Think Big. We Do" branding campaign
 - Developed a comprehensive and nationally based Alumni Relations program
 - Presidential Transition Officer 2009–2010
- ▶ Led marketing campaigns in Minnesota and in Pennsylvania
- ▶ Vice Chancellor, Minnesota State University System 1987 – 1991
- ▶ Vice President, Edinboro University of PA 1982 –1987
 - Conducted first capital campaign

Robert Beagle **cont.**

- ▶ Member, South County Hospital Capital Campaign Cabinet
 - Member, South County Hospital Strategic Planning Committee for Development and Marketing
- ▶ Member, St. Paul (MN) Boy Scouts of America Board 1987–1991
- ▶ MA Communications, Penn State University; BA Political Science, Dickinson College
- ▶ Contributing author to four professional books; author of four professional articles; presenter at numerous regional and national conferences
- ▶ Recipient of the Council for the Advancement and Support of Education (CASE) Distinguished Service Award

Richard Beaupre

- ▶ Founded ChemArt Inc. in 1976 and serves as its CEO
- ▶ Advisor and a Trustee for Davies Technical High School
- ▶ In 1962, graduated from University Of Rhode Island
 - Serves on the URI Arts & Sciences Advisory Board
 - Helped establish the Hope and Heritage Fund
 - A long-time major contributor to his alma mater
 - Received the Alumni Business Award in 1998
 - An honorary Doctorate from URI granted in 2003
- ▶ Board of Directors of the Rhode Island Philharmonic
- ▶ Treasurer of St. John's Episcopal Church

Richard Beaupre cont.

- ▶ Benefactor of:
 - Amos House
 - RI Hospice
 - Salve Regina College
 - Little Sisters of the Poor
 - The Rhode Island Philharmonic
 - Narconon
 - City of Hope
 - First Night
 - Catholic and Episcopal Charities
- ▶ The 1998 Rhode Island and New England Small Business Person of the Year

Richard L. Bready

- ▶ Chairman and Chief Executive Officer at Nortek, Inc. from 1990 to 2011 and President from 1979 to 2011
- ▶ Member of the Board of Directors or a Trustee of:
 - Newport International Film Festival
 - Gabelli Asset Management
 - BankRI
 - Professional Facilities Management, Inc.
 - Roger Williams University (Chairman of the Board)
 - Trinity Repertory Company
 - Junior Achievement
 - Providence Performing Arts Center
 - Rhode Island Public Expenditure Council
 - National Conference of Christians and Jews
 - YMCA of Greater Providence
 - International Yacht Restoration School
 - Corporation Member of Rhode Island Hospital

Richard L. Bready **cont.**

- ▶ Independent Financial Consultant and an Audit Manager at major public accounting firm
- ▶ Corporation Member and Member of the National Council, Alumni Executive Forum, and Audit Committee of Northeastern University
- ▶ Member of the Senior Executive Advisory Board of Sterling Investment Partners
- ▶ Master's degree in Accounting from Northeastern University; CPA; Bachelor's degree in Economics from St. Anselm College
- ▶ Honorary Doctorates of Business Administration from Johnson & Wales University and Roger Williams University
- ▶ Entrepreneur

Merrill W. Sherman

- ▶ Spearheaded the 1996 creation of Bank Rhode Island
- ▶ Former Chief Executive Officer and President of Bancorp Rhode Island, Inc. and its wholly owned subsidiary, Bank Rhode Island
- ▶ Spent 17 years practicing law at a major Providence firm
- ▶ Member of the Board of Directors or a Trustee of:
 - Blue Cross & Blue Shield of Rhode Island, Inc.
 - Preservation Society of Newport County
 - Crossroads Rhode Island
 - Providence Foundation (Executive Committee)
 - Rhode Island School of Design (Former Chair)
 - Johnson & Wales University

Merrill W. Sherman **cont.**

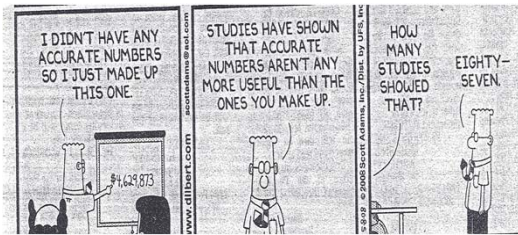
- ▶ Co-Chaired the 2007 Pell Awards to benefit Trinity Repertory Company
- ▶ Co-Chaired the Individual Gifts Committee for Women & Infants Hospital Capital Campaign
- ▶ Named Citizen of the Year by the March of Dimes in 2007
- ▶ Inducted into the Rhode Island Heritage Hall of Fame
- ▶ A.B. from Mount Holyoke College, a J.D. from the University of Denver, College of Law
- ▶ Honorary Doctorate from Johnson & Wales University

Characteristics of a Successful Fundraiser

- › Good Communicator
- › Passionate
- › Enthusiastic
- › Committed to the Cause
- › Strategic and Innovative
- › Vigilant
- › Organized
- › Optimistic, with Good Self-Esteem
- › Good Team Member
- › Integrity
- › Authenticity
- › Extroverted
- › Good listener
- › An inspirer
- › A connector
- › A story-teller
- › A critic
- › A coach
- › A builder
- › They love their work



What's Missing?



The Answer:

A Sense of Humor

"Having a good sense of humor may be the most important trait of all. One had better have a sense of humor in a profession where the workday can average 10-12 hours and the tenure of the job itself can be as short as 18 months."

Fundraising Basics, A Complete Guide
Barbara L. Ciconte and Jeanne G. Jacob

Expect the Unexpected

"To expect the unexpected shows a thoroughly modern intellect."

Oscar Wilde

The Unexpected





"Thanks, Rog, but I think I'll come up and see your donor plaques another time."

The Unexpected

- ▶ The President asks the potential donor for \$3M when his last gift was \$150,000 10 years ago and he hasn't been cultivated since
- ▶ A \$50 a year donor for many years leaves \$2.5 million to the organization - never been visited
- ▶ The donor is rude, loud and critical of staff (dress, weight, voice) at events
- ▶ The donor takes off his shirt to change while you are in the room
- ▶ You take a new job and the person who hired you is "let go"
- ▶ "Let's go in the hot tub"

Wait Wait... Don't Tell Me



Which Story is the True One?

- ▶ 1) The 70+ year old "date"
- ▶ 2) The Podiatrist
- ▶ 3) The Phallic Symbols
- ▶ 4) The Cantankerous Prospect

