

Naomi Levine:

Insights from a Master of Fundraising

Interview by Ruth McCambridge

While allowing
that there are
new trends in
philanthropy,
the fundamentals
remain the same:
developing
relationships,
having a good
product, knowing
how to find the
right donors, and
having a board
that is prepared
to help in
the effort.

A fundraiser for New York University and president of its George H. Heyman, Jr. Center for Philanthropy and Fundraising, Naomi Levine is credited with helping to save the university from bankruptcy. Levine, who just passed her ninetieth birthday, says that her mother always told her she was very smart. I would agree with her mother—and, indeed, with the many people who over the years have trusted Levine to fundraise for and from them. In the following interview, Levine says that much of being successful as a fundraiser is about building authentic relationships and just being interesting—and there is no hiding Levine's authenticity or vivid intellect.

Ruth McCambridge: Naomi, you have helped raise more than \$2 billion in contributions for New York University (NYU), which is a phenomenal accomplishment. I want to ask you a set of questions about what you see as having changed in the philanthropic landscape and in approaches to fundraising. But first, could you describe how you got into fundraising? When did that happen, and who helped you get in? You did not start out as a fundraiser. . . .

Naomi Levine: No. I am a believer in John Lennon's line, "Life is what happens to you while you're busy making other plans." I'm a lawyer, and I had been at the American Jewish Congress overseeing a very important program in civil rights and civil

liberties—an area in which I was and still am very interested. But after twenty-five years I realized I was fifty-five years of age, and if I didn't have any other experience that would be my only job. I had become executive director, the first woman to hold such a position in Jewish life; people made a big fuss about me, and I could have stayed there comfortably. But I felt it was time for a change, and I talked casually to a friend at lunch, and he knew the chairman of a search committee for a vice president for NYU. He gave my name to the president, John Sawhill, who called me. We had an interview, and for whatever reason, I got the job.

The job was senior vice president, and it covered many areas. It covered lobbying in Washington and Albany, which I had done. It covered press, public relations, special events, etc. Fundraising and development were one part of it. After a while, however, since NYU was close to

RUTH MCCAMBRIDGE is the *Nonprofit Quarterly's* editor in chief.



The donors that I met with were very intelligent—as smart as me or smarter—and if I didn’t come to them with something of value, they weren’t going to fund it.

bankruptcy when I came in, in 1978, fundraising became my overwhelming responsibility.

So I got into fundraising so intensively by accident. But I was very fortunate. The president had brought in a new chairman of the board, Larry Tisch, and Larry made fundraising his priority. He also brought in George Heyman, a very respected leader in the world of finance, who became the chair of the trustee development committee. And they took me under their wing and taught me everything I know. Indeed, I organized the Heyman Center for Philanthropy and Fundraising to teach what Larry and George had taught me.

RM: *So you are ninety now, which means you’ve had thirty-five years of experience in the field. Can you talk a bit about what you have learned and the principles that guide your work?*

NL: Let me tell you my approach, because you started off the interview suggesting that there were new techniques and approaches that might change the face of philanthropy. I only agree with you halfheartedly, because I think that some of the basics in fundraising will be and are relatively the same over time. There are changes and there are new trends that we could talk about, but there are some fundamentals that I learned, and those have guided me in my fundraising and my teaching.

First of all—and this may have been often repeated, but for good reason—I believe that fundraising is developing relationships. You have to be able to get people to trust you and to like you, and to think that what you’re coming to talk with them about is of interest to them and is something of importance that deserves support. The “program or project” is critical. You also have to be a relatively interesting person so they’re prepared to develop a relationship with you. And when I say interesting, that means you must read—you must know what’s happening in the world. When you sit down with someone and try to develop a relationship, you can’t just say, Oh, Mrs. Jones, would you give me \$100 million? That’s not the way it works. It’s a slow process. The quicker you ask, the less you get. Developing relationships and trust often takes a long time.

Second, as I said above, I believe that you have

to have a good product. You can’t sell *anything*—you have to sell something that’s of value, that is going to make the world a little better, that’s going to help solve a problem. The donors that I met with were very intelligent—as smart as me or smarter—and if I didn’t come to them with something of value, they weren’t going to fund it.

And then you have to be able to find somebody who will be interested in that project, and *that* requires some good research.

In addition, you asked me what I have learned. I learned that you can’t do a fundraising job in an institution unless you have a board that is prepared to help you. Mr. Tisch was very strong on that issue. He felt that sitting on a board not only was an honor but also carried responsibilities—fiduciary, legal, financial, etc. You not only had to come to meetings, to review the budget, to participate—he felt you also had to a) give some money—it didn’t have to be large, but you had to show your financial commitment; b) help get money; or c) if you could do neither a nor b, not serve on a board. I could look at your board and within an hour tell you whether you’ll be here in five years or not.

So let me repeat: boards are critical. Fundraisers can’t go out on their own and raise the money. Who did I know? Did I know all the affluent people in New York City? Obviously not. The board gave me names. They made suggestions. There’s a principle in fundraising that “people give to people.” They were not going to give to *me*; obviously, they were going to give to people with whom they had a relationship. Peers are important.

A board gives you such relationships. You must also have a competent and dedicated staff to help you.

RM: *What do you think are the worst mistakes people make when they’re readying themselves to be fundraisers? What are the worst assumptions and the worst practices that you see out there?*

NL: Well, first of all, I believe that fundraising must be viewed as a very sophisticated profession. It breaks my heart when people don’t recognize that. You know, they think, Oh, fundraising, it’s selling cookies for the Girl Scouts. That’s nonsense.

Today, if you're going to be a good fundraiser, you really should take courses in it and get educated, because it involves, for example, planned giving, technology, capital campaigns, etc., and you must have knowledge about the laws. You can get into serious trouble if you don't know the IRS rules on good governance. You have to know the federal laws. You have to know the state laws. And you must be sensitive to the ethical issues that arise in fundraising. So I believe that a mistake a person could make is wanting to go into fundraising without an education in fundraising.

For example, we give a course on the art of the ask. Now, I've been involved in a lot of asking, but I went to that course and, I must tell you, I learned something. And, in planned giving, I've learned a great deal that even as a lawyer I was not aware of before.

About the worst thing you could do is, out of ignorance, make ethical misjudgments or get involved in unethical behavior—even inadvertently. The worst thing you could do is to get a reputation that you're not an ethical person. Nobody wants to deal with a slick, unethical person. You can't lie. You can't misinterpret. You can't pressure. You have to obey the rules of privacy. All that matters. You don't learn about that unless you take courses. So I believe the worst thing a person could do is think that the field today is just selling cookies. It's far more difficult and sophisticated.

RM: *You have talked about a lot of things that are constant and abiding. Have you noticed anything significant that you think has changed?*

NL: Well, yes. There are new trends in philanthropy—something fundraisers today should understand. I read a report that indicated that, in the next ten or fifteen years, \$40 trillion—*trillion*, not million—are going to be transferred from one generation to another, because a lot of people from this generation and the one before made an enormous amount of money.¹ And that money is being transferred, in many cases, to younger people. So the first trend to notice is that there will be younger people, in their late teens, twenties, and thirties, who will have a great deal of money.

Second, their interests are, according to this

study, not exactly the same as those of their parents. Yes, they will give to some places that their parents gave, but their interests are in the environment, including animals. They're interested in civil rights, women's rights, gay rights. They're interested much more in international issues. They're interested in poverty and projects to make things better socially and economically for people in need. And, according to the study, they are not giving as much to, for example, hospitals and health institutions, maybe because they're young—they don't think about illness and dying. Also, they're not giving as much to religious institutions, and they're not giving as much to arts and culture. Perhaps in time this too will change.

So these new trends are one thing that you have to know about. A lot of money is going to be transferred. The people are going to be younger. Their interests are not the same.

The report also states that these younger philanthropists want to see results, and they're using metrics and business systems to see what results their money is making. If they give, they want to see what happens with their money, and they want to make sure that they can watch it. Therefore, they don't like umbrella groups, like UJA-Federation of New York and United Way, because there the money goes in a pot and they don't know exactly how it is being used. And, also, they are a generation that will use technology far more than in the past. Now you have to know all about social media and how to use it in fundraising, and how you get your image across on the Internet. Technology is obviously increasingly important.

I started off by saying in the beginning of the interview that, yes, there are new trends and changes. But, on major gifts, I believe that the fundamentals will remain.

Note

1. Sharna Goldseker and Michael Moody, *Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy* (Grand Rapids, MI: Dorothy A. Johnson Center for Philanthropy and 21/64, 2013).

To comment on this article, write to us at feedback@npqmag.org. Order reprints from <http://store.nonprofitquarterly.org>, using code 200211.

[T]hese new trends are one thing that you have to know about. A lot of money is going to be transferred. The people are going to be younger. Their interests are not the same.

THE Nonprofit QUARTERLY

The latest news and analysis about the nonprofit sector from the *Nonprofit Newswire*

Regular feature articles

Subscription information for the print magazine

For more information from the *Nonprofit Quarterly* go to www.nonprofitquarterly.org