
Guide New Partners to High-Return Activities: Perfecting the Partnership Series

Translating Insight Into Action

A Discussion and Self-Reflection Guide

Instructions:

Consider the following questions to connect today's webconference presentation with your own experiences and institutional context. The questions can be used for self-reflection or group discussion.

1. How effectively do we onboard new leaders to advancement?
2. Are academic leaders focusing on major and principal gifts? Are they distracted by any other activities?
3. Do current leaders over-rely on philanthropy to meet their budget needs?
4. Do any leaders struggle to express a vision for their unit? How can we help them create one?
5. How can we hold everyone accountable for advancement activities and goals?

Prioritization Guide

Speeding Implementation and Ensuring Follow-Through

Instructions:

Based on your institution's goals and available resources, use the chart below to map out which of the practices profiled in this section you would like to prioritize. Use this document to assess viability and determine next steps.

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
<p>MGO Metrics Updates <i>Clemson University</i></p> <p>Weekly emails keep deans focused on high-return activities, discouraging them from distracting frontline fundraisers with other activities.</p>	<p>1 2 3 4 5 <i>Disagree Agree</i></p>	
<p>Individualized Activity Plans <i>University of Oregon</i></p> <p>Advancement staff create individualized annual plans for academic partners focusing on concrete, feasible tasks.</p>	<p>1 2 3 4 5</p>	
<p>Deans' Advancement Dashboards <i>Simon Fraser University</i></p> <p>Dashboards inform deans about their own advancement performance, as well as the progress of their MGOs and faculty members.</p>	<p>1 2 3 4 5</p>	
<p>Mini Feasibility Assessments <i>Bucknell University, University of Rochester</i></p> <p>Communicate whether a dean's priorities can be funded through philanthropy using prospect capacity data and donor opinion assessments.</p>	<p>1 2 3 4 5</p>	

Prioritization Guide (cont.)

Speeding Implementation and Ensuring Follow-Through

Practice	My Institution Should Prioritize This Practice	Notes and Next Steps
<p>Strategy White Papers <i>Boise State University</i> Ask a series of simple questions to turn academic visioning into a structured, time-limited task.</p>	<p>1 2 3 4 5 <i>Disagree</i> <i>Agree</i></p>	
<p>Visioning Walking Tour <i>Queens University of Charlotte</i> Deans share the story of their unit priorities and vision through an in-person building walkthrough.</p>	<p>1 2 3 4 5</p>	