# Board Leadership and the Campaign

## Activating the Board's Campaign Support Through Education

Advancement Forum

# Onwards and Upwards

## Mega-Campaigns Have Reshaped the University Fundraising Landscape

### Recent Billion-Dollar Plus Campaigns

| | |
| --- | --- |
| University of Southern California | $6B |
| MIT | $5B |
| University of Toronto | $2B |
| The University of Akron | $1.2B |
| Michigan State University | $1.5B |
| Caltech | $2B |

**87+** $1B+ campaigns completed in last 15 years at higher education institutions

**20%** Percentage of higher education campaigns with goals of $1B+ in 2015

**The Board Needs to Step Up Their Game**

"As the board keeps setting more ambitious campaign goals, they want them concluded in shorter and shorter amounts of time, but they need to upgrade their commitments too. "

*Vice President of Advancement, Master's College*



Source: "CASE Campaign Report," *Council for Advancement and Support of Education,* 2015; Grenzenbach Glier and Associates, http://www.grenzebachglier.com/assets/files/GG+A%20-20Billion%20Dollar%20Campaign%20List%20-%203-15-2015.pdf; Advancement Forum interviews and analysis.

# Longer Time Frames, Bigger Goals



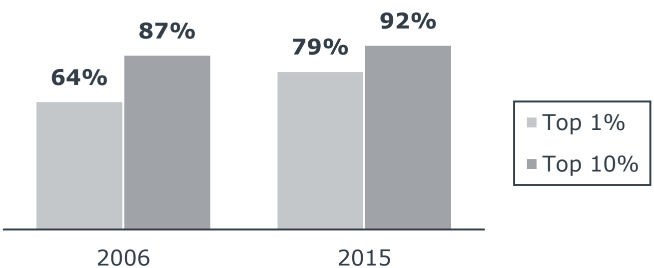
## Modern Campaigns Rely on Major Gifts to Hit Ambitious Targets

### Burgeoning Campaign Goals

**150%** Growth in median campaign goals from 2000 to 2015

**7.92** Years to complete median $1B+ campaign in 2015

### Percentage of Total Campaign Dollars Provided by Top Donors




### Change at the Top

"I've been looking a lot at how fundraising has changed over the past 20 years. We all know the 80/20 rule—20% of donors will give 80% of the funds we bring in. The problem now is that 80/20 doesn't hold up anymore. It's changing. It's more like 90/10, or even 95/5. That's order of the day in shops like this."

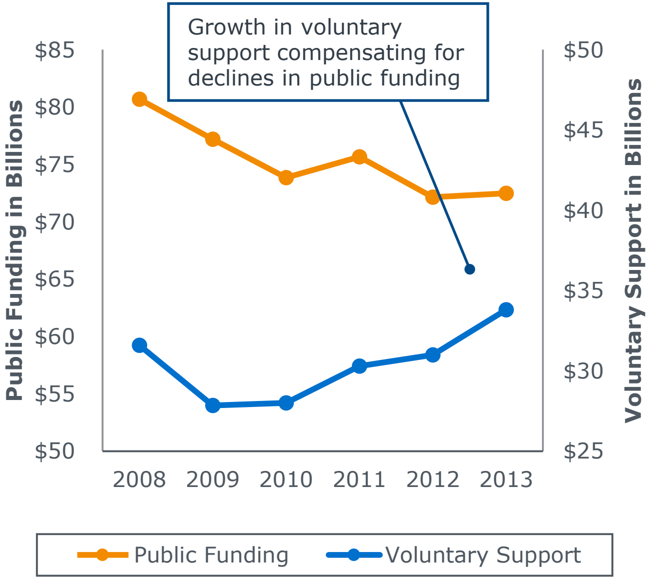
*Ron Cohen*
*Vice President of Advancement*
*Susquehanna University*

Source: "CASE Campaign Report," *Council for Advancement and Support of Education,* 2015; Advancement Forum interviews and analysis.

# Increased Demands for Philanthropic Support

## Administrators Look to Advancement to Fill Holes

**Public Universities Increasingly Reliant on Advancement**
*Revenue by Source (2008-2013)*[1]




"Advancement has taken on much more of an important role lately, which coincides with the downturn in state support. We've seen increases in tuition, but politically you can't increase tuition enough to take care of your shortfall—and you don't want to. So philanthropy is the next frontier. In the old days whatever you raised was good enough—now it's not."

*Keith Inman*
*Former Vice President, Advancement*
*University of Louisville*

1) In real 2013 billions of dollars.

Source: "SHEF – State Higher Education Finance FY14," *SHEEO*, April 12, 2015, http://www.sheeo.org/resources/publications/shef-%E2%80%94-state-higher-education-finance-fy14; The Integrated Postsecondary Education System, *National Center for Education Statistics*, https://nces.ed.gov/ipeds/; Advancement Forum interviews and analysis.

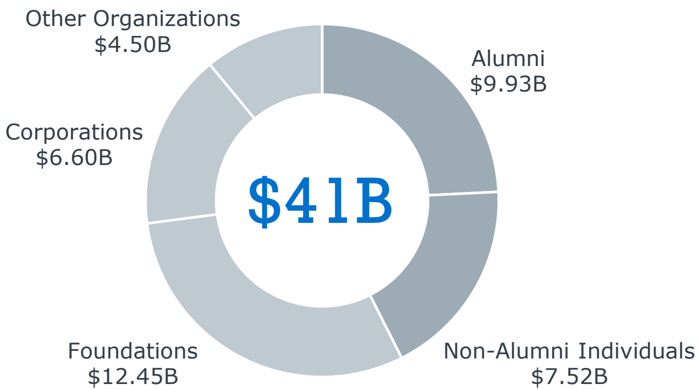
# Despite Challenges, Growth in Voluntary Sector



## Higher Education Giving Back to Pre-Recession Levels

### Support of Higher Education Reaches New Heights

*Voluntary Support by Source, 2016*




### Yet Personal Giving Begins to Decline

**↓ 8.5%**

Percentage decrease in alumni giving, 2015 to 2016

**↓ 6.0%**

Percentage decrease in non-alumni giving, 2015-2016



Source: Council for Aid to Education, 2016; Advancement Forum interviews and analysis.

# The Road Ahead is a Challenging One…



## …And the Board is More Important Than Ever Before

### Complicated by Larger Questions

- Historic levels of student debt
- More diverse alumni segments
- Questions about the overall value of higher education

The Economist — *Is College Worth It?*

The Boston Globe — *The College Debt Crisis is Even Worse Than You Think*

The New York Times — *Wrestling With Title IX*

**Board Involvement and Support is Mission Critical in These Times**

"The Board's role is being increasingly more central to Campaign planning, execution, and financial success. We need to equip members with the right toolboxes and informed education to speak eloquently and to ensure success."

*AVP Development, Private Research University*



Source: Advancement Forum interviews and analysis.

# Board’s Influence Like No Other

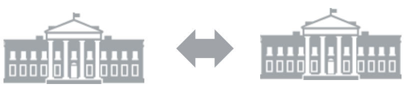


## Credibility and Networks We Can’t Tap Alone

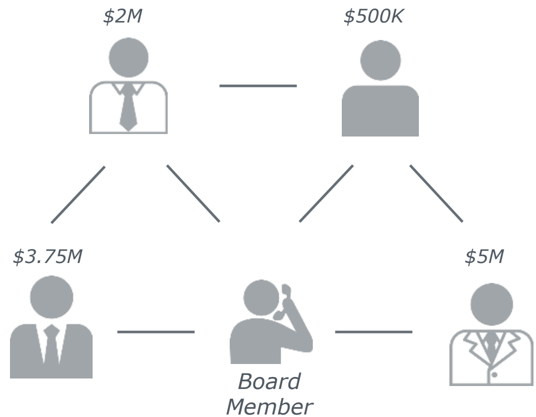
### Unparalleled Credibility

*Honest Brokers*


*True Peers*



### Network of Relationships




Source: “A Powerful Influence,” *The Advisory Board Company, Philanthropy Leadership Council*, 2014, p. 33; Advancement Forum interviews and analysis.

# Trustees Achieve Results Where Others Can't

## Need to Activate Trustees Key to Campaign Success

### Initiating Relationships with Top Prospects

- Informing strategy development
- Making initial contact
- Participating in first meeting

### Deepening and Sustaining Relationships

- Participating in on-going face-to-face interaction
- Informing development office of relevant updates

### Soliciting Large Gifts

- Attending solicitation meetings
- (If appropriate) making gift asks for campaign priorities

**Top Reasons Board Members Don't Participate in Major Gifts Fundraising**

- Don't understand the moves management process and envision it involves cold calls
- Worried they will be asked to do something outside their comfort zone such as soliciting friends and colleagues
- Don't realize they have the skills and competencies to successfully help development officers

Source: "A Powerful Influence," *The Advisory Board Company, Philanthropy Leadership Council*, 2014 , p. 34; Advancement Forum interviews and analysis.

# The Board and the Campaign

## Possible Challenges Abound

### Combating Common Board Engagement and Giving Challenges in the Campaign

**Priority and Language Disconnect**
Board members often do not understand the nomenclature of the campaign or advancement

**Command of Campaign Nomenclature**
Ensuring the Board speaks eloquently around campaign priorities

**Fallow Contributors**
Individual board members lie fallow in their giving and engagement with the campaign

**Rescoped Board Roles**
Board contribution where it counts and improved board onboarding

**Tyranny of Reciprocity Perils**
Board members are fearful of making introductions that place them in tough situations

**Deeper Philanthropic Networks**
Foster greater connections through expanded referral systems



Source: Advancement Forum interviews and analysis.

# Board Leadership and the Campaign

## Roadmap for Today's Session

### Providing a Command of Campaign Nomenclature

- Campaign fluency checklist
- Off-cycle education session
- Integrated campaign board

### Evaluating Rescoped Board Roles

- Reframed job descriptions
- Recruitment worksheet
- Buddy system
- One-year trial terms
- Self-audit
- Engagement scorecard

### Fostering Deeper Philanthropic Networks

- Board referral scorecard
- Philanthropic visits
- Storytelling framework
- Pre/post visit huddles



Source: Advancement Forum interviews and analysis.

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Source: Advancement Forum interviews and analysis.

# Questions About Relevance and Support Abound

## Can Your Board Members Speak to These Questions?

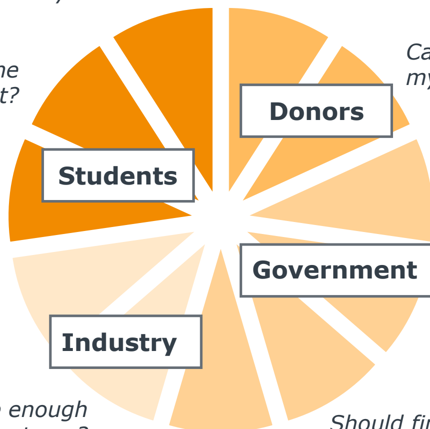
*How do I ensure I'm getting my money's worth?*

*Are there worthier causes?*

*Is a degree worth the investment?*

*Can I trust a university to spend my money wisely?*

*Will I be in debt the rest of my life?*




*If higher ed is mainly for the privileged, shouldn't government dollars be used on true public goods?*

*Can a degree really tell us who will be a good employee?*

*What other strings can we attach to ensure research funding supports national goals?*

*Will universities be responsive enough to be good research partners?*

*Should financial aid dollars go to alternative providers?*

*Does higher education deserve its tax breaks?*



Source: Advancement Forum interviews and analysis.

# Advancement Nomenclature Challenges Abound

## Campaign Language is Foreign to Board Members




Source: Advancement Forum interviews and analysis.

# Using Language That Resonates with the Board



## Combating Nomenclature Disconnects

### A Status Quo Board Report

**Dear Trustee,**

We thank you for your continued leadership at *Hazel University* as a trustee. Please find below an abridged campaign update report:

- Total raised to date: $137M
- Increase in productivity: +12%
- Focus area targets:
    - A (24%), B (78%), C (18%)

**Why the Status Quo Doesn't Work:**

- Uncertain what metrics compute total productivity
- Unclear why campaign focus areas realize gift success at different rates
- Doesn't acknowledge the investment costs to raise total productivity

### Campaign Fluency Briefing Document

**Common Campaign Nomenclature to Include**

- ☑ Return on Investment
- ☑ Campaign Priorities
- ☑ Gift Officer Total Productivity
- ☑ Commitments Realized
- ☑ Sources of Giving
- ☑ Restricted Giving



Source: Advancement Forum interviews and analysis.

# Fluency Not Enough, Communication is Key



## Six Communication Triggers: When to Communicate

### Updates and Follow-up Between Meetings

- Current campaigns
- Current fundraising priorities
- Current university priorities

### Major Fundraising Changes and Priorities

- Campaign milestones and achievements
- New university advancements related to fundraising successes

### Major Upcoming Announcement

- Executive transitions
- Community partnerships
- Articles in local and national news media

### Update on Member Supported Project

- Student success story
- University improvements in student success
- Accolades from external organizations

### Notable Board Achievements

- Stories about how a board member helped close a gift
- Impact of a successful board referral

### Pre-board Meeting Communications

- Consent agendas
- Pre-reading
- Assessments of topics under consideration at next board meeting

Source: The Health Care Fundraising Board of 2020, p. 34; Philanthropy Leadership Council interviews and analysis.

# Maximizing Time Between Board Meetings



## Board Education: An Iterative and Ongoing Process

**Traditional Board Meetings**

- Finite in number
- Limited in time and scope
- Often focused on governance-related topics rather than campaign education

**Board Member Education Needs**

- Iterative and consequential
- Requires constant clarification
- Often requires sustained time and investment to effectively communicate

### Maximizing Inter-Meeting Communication Channels

**Governance Focused Conference Calls**

Using previously scheduled off-meeting conference calls to focus on governance-related topics, allows campaign management staff at the **William & Mary** more time to focus on campaign education during in-person meetings

**Campaign Education Webinars**

To supplement traditional in-person meeting campaign priority education, the **University of Cincinnati** uses webinar technology to inform board members of recent initiatives and present talking points



Source: Advancement Forum interviews and analysis.

# Making the Most of the Board Meeting



## Ensuring Governance Does not Overshadow Development

### Previous Agenda Format

**8:00 AM**

- Call to order and introductions

**8:10 AM**

- Operational overview and review of financial statements
- Pending gifts and campaign updates

**8:40 AM**

- New initiative prospect brainstorm and referral

**9:10 AM**

- Debrief and review prospect names

**9:20 AM**

- Vice President's report

General discussion replaced with active priority education

Reporting reduced and moved to end of meeting

Executive presence elevates mission of board

### Updated Agenda Format

**8:00 AM**

- Call to order and introductions

**8:10 AM**

- Introduction to new research initiatives
- Panel discussion on fundraising priorities A, B, and C
- Role-play activity on campaign initiatives
- Role-play discussion

**9:10 AM**

- Review of financial statements and governance topics

**9:20 AM**

- President's report

Source: The Health Care Fundraising Board of 2020, p. 28; Philanthropy Leadership Council interviews and analysis.

# Disparate Boards, Disparate Knowledge



## Understanding Board Competencies Throughout the University

### Publicly-Appointed Board of Visitors

*Knowledge areas and skills:*

- ✔ Knowledge of university structure
- ✔ Often successful politicians
- ✔ Strong understanding of intuitional mission and vision of leadership

*Skill and knowledge gaps:*

- ✖ Uncertain about priorities that resonate with philanthropists
- ✖ Often not confident about making a gift solicitation
- ✖ Often focused on governance-related topics rather than campaign education

### Fiduciary Responsible Foundation Board

*Knowledge areas and skills:*

- ✔ Knowledge of philanthropy
- ✔ Often successful business people
- ✔ Strong understanding of campaign priorities and expectations

*Skill and knowledge gaps:*

- ✖ Uncertain about aspects of university structure
- ✖ Limited time dedicated to learning
- ✖ Often focused on campaign planning and execution over university leadership



Source: Advancement Forum interviews and analysis.

# Integrated Campaign Board Combats Skills Gap

## Wedding Disparate Board Members to Ensure Campaign Successes

### William & Mary Integrated Campaign Leadership Board

*Board of Visitors Representatives* + *Foundation Board Representatives* = *Campaign Leadership Committee*

### Board with Dual Representation Ensures Campaign Success

- ✔ Increased institutional knowledge
- ✔ Deep knowledge of philanthropy
- ✔ Increased likelihood of future board collaboration
- ✔ Greater breadth of skills



Source: Advancement Forum interviews and analysis.

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### Fostering Deeper Philanthropic Networks

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Source: Advancement Forum interviews and analysis.

# Onboarding Board Members: Tried and True

## Missed Opportunities Abound When Onboarding New Board Members

### Status Quo Board Onboarding Scenarios

1. Foundation has a board position available and sources interested individuals
2. Individuals are vetted by board members and foundation staff
3. Individuals often meet with staff and board members to understand role
4. Board members are presented with an introductory education session

### Common Challenges and Barriers

- Time consuming for staff to organize
- Questionable return on investment
- Onboarding not curated for specific skills acquisition
- Missed opportunities to connect board skills with campaign priorities

*"I own my own business, but I am not sure how the University is run, I wish there was more education around that."*

*"I am a lawyer with skills as well as community connections, but it was unclear to me how I can use those skills to advance the campaign."*



Source: Advancement Forum interviews and analysis.

# Revamping Board Position Descriptions



## Refocused Job Descriptions Calibrates Giving and Engagement Expectations

### Previous Board Expectations

**Board Activities**

- Attend at least 50 percent of meetings

**Fundraising**

- Encouraged to example with personal giving
- Suggested participation in cultivation events

**Fiduciary**

- Board members have a fiduciary responsibility to assure the workings of the Foundation are in accordance with good practice and accounting principles

**Advocacy**

- Serves as an Ambassador for the University

### Revised Board Expectations

**Board Activities**

- Attend at least 3 of 4 meetings
- Participate in inter-meeting communication

**Fundraising**

- Set example with personal giving
- Participate in cultivation events
- **Learn about methods and skills used to raise funds**
- **Identify, cultivate, solicit, and steward prospects**

**Fiduciary**

- Board members have a fiduciary responsibility to assure the workings of the Foundation are in accordance with good practice and accounting principles

**Advocacy**

- Serves as an Ambassador for the University
- **Communicate with state and federal legislators on the University's behalf as requested**

Source: The Health Care Fundraising Board of 2020, p. 35; Philanthropy Leadership Council interviews and analysis.

# Refocusing Board Recruitment Worksheet



## Refocused Board Referral Guide Yields Qualified Board Talent

**Board Recruitment Guide**

Name of candidate under review: ___________________________________ Date: ____________

Cumulative giving to institution: $_____________________________ over _______________ years

Other philanthropic commitments in community: __________________________________________

Connection to institution: ___________________________________________________________

************************************************************

**BACKGROUND CHECKLIST**

*Review the criteria below. Check all that apply to this candidate.*

☐ Willing to spend 80% or more of board time commitment on supporting major gifts fundraising
☐ Willing to serve as an advocate for the organization out in the community (e.g., share with peers, colleagues, relatives, and others the institution's vision, community role, impact, and opportunities)
☐ Willing to serve as an advocate for specific funding initiatives (e.g., advocating for the specific priorities for which the foundation is raising funds)
☐ Has affinity for a priority area aligned with top fundraising initiatives
☐ Has sufficient time to dedicate to supporting the foundation Estimate your board service time requirement here: _____________ hours per quarter
☐ Has given at least one major gift to the institution (giving level depends on your major gift threshold)

*For a candidate to be considered for the board, at least four boxes above must be checked.*

Source: The Health Care Fundraising Board of 2020, p. 36; Philanthropy Leadership Council interviews and analysis.

# Onboarding Board Members Intentionally



## Board Buddy System Represents Win-Win at the University of Vermont

### 1 Prioritize
Board Onboarding and Education

Focus on intentional pairing of experienced board members with new board members to provide exposure and education

### 2 Optimize
Specific Areas of Opportunity and Focus

Identify and approach existing board members who have relevant skills that the new board member may be lacking

### 3 Align
Buddy System with Campaign Education Needs

Ensure that newly appointed Foundation board members are paired with experienced members based on skills required to ensure continued campaign success

**Intentional Education is Key**

"If you have a board whose membership is dynamic, members are never all in the same place in terms of understanding how the university functions. Most people find the inner workings of universities to be confusing. What is shared governance? What is a provost?...We need to elevate the understanding of how the university works without spending all of our time in education mode."

*Rich Bundy, Vice President for Development and Alumni Relations, Pennsylvania State University*
*Former President and CEO, University of Vermont Foundation*



Source: Advancement Forum interviews and analysis.

# Exploring Board Trial Terms



## Test Drive Board Membership to Ensure Mutual Attraction

**Board Recruitment and Onboarding Timeline at Parkland Hospital Foundation**

### 1

**Recruitment**

- Collaboration among governance committee, chief advancement officer, and new member
- Presentation of new member's individuals activities for the year
- Conveys the seriousness of volunteer commitment
- Discusses the financial responsibility of board membership

### 2

**First-Year Trial Term**

- New member knows he or she will have conversation about their feedback and experience at the end of the year
- There may or may not be a formal invitation to join
- With expectations clearly laid out, new member is more likely to be an active participant

### 3

**Full Three-Year Term**

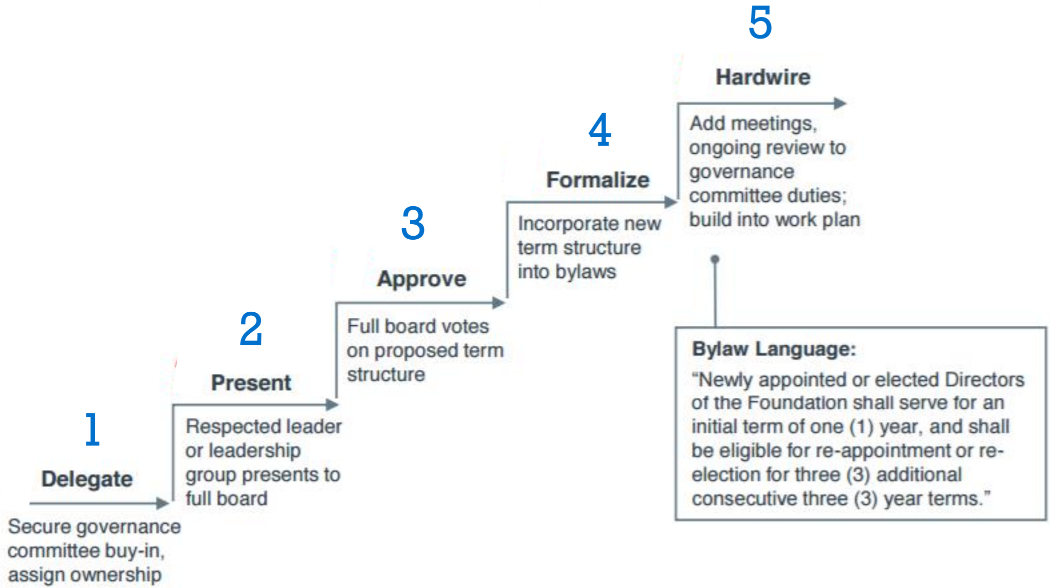
- Scheduled (typically Jan. 1$^{st}$)
- Reviews new member's activities to date; includes offer to continue service
- New member asked for feedback on experience
- New member asked what additional resources are needed for more effective onboarding

Source: The Health Care Fundraising Board of 2020, p. 38; Philanthropy Leadership Council interviews and analysis.

# Making it Work on Your Campus: Trial Terms

## Key Steps to Developing a Board Trial Period

### Five Steps to Implement One-Year Trial Terms




Source: The Health Care Fundraising Board of 2020, p. 38; Advancement Forum interviews and analysis.

# A Safe Space for Reflection



## Providing a Tool to Critically Reflect on Skills, Talents, and Impact

### Volunteer Self-Audit Survey

**Instructions for Board Member:** This survey will be used to understand your experience and feedback on your board service in the past year. Please answer the questions below as honestly as possible. Review this in a conversation between you and a member of the trusteeship committee or other board leaders, to ensure both you and the board are achieving value, and to discuss continued involvement.

***Section I: Past Performance (filled in by development staff)***

1. Years of service: __________
2. Meeting attendance during recently completed fiscal year ( FY _______): _____ out of _____ meetings
3. Committee participation: ______________________________________________________________

***Section II: Self-Assessment***

1. Are you interested in continuing your board service? ❑ Yes ❑ No
   *(If 'yes,' please continue.)*
2. Do you have access to individuals in the community who can help with philanthropy? ❑ Yes ❑ No
3. Are you willing to tap into that network? ❑ Yes ❑ No
4. Are you willing to fulfill next year's board requirements? ❑ Yes ❑ No
5. Do you understand how your contributions have made a meaningful difference at our institution? ❑ Yes ❑ No
6. Do you feel like you have personally grown and developed through your board service? ❑ Yes ❑ No
7. Do you regularly talk with people in your professional and personal networks about our institution? ❑ Yes ❑ No

***Section III: Required Resources and Training***

1. Do you feel you have all of the resources and training you need to fill your role as a board member? ❑ Yes ❑ No
2. Do you feel comfortable speaking about the top priorities of our institution? ❑ Yes ❑ No
3. Do you feel comfortable communicating the value of our institution to community members? ❑ Yes ❑ No
4. Do you feel understand discrete fundraising activities you can support? ❑ Yes ❑ No
5. What additional support do you need from development staff?
6. What additional support do you need from volunteer leaders (i.e., board chair)?
7. What additional support do you need from fellow board members?
8. How can we improve board meetings?

### Sample Topics Addressed in a Volunteer Self-Audit

- Meeting attendance
- Task force/ committee participation
- Assistance with moves management
- Questions about how to assist with moves management steps
- Questions about how to respond to common questions from community
- Resources needed to complete tasks

Source: Volunteer Self-Audit Survey, https://www.advisory.com/-/media/Advisory-com/Research/PHIL/Resources/Foundation-Board-Resources/Volunteer-Self-Audit-Survey.pdf; Advancement Forum interviews and analysis.

# Taking the Next Step



## University of Cincinnati Hardwires an Annual Review and Discussion

### Co-Creating an Engagement Plan for the Year

**VP Liaison**

- Meets annually with their assigned board member(s)
- Works with four or more board members
- Additional to existing gift officer assignment

**Board Member**

- Receives a summary of their service for the recently completed fiscal year
- Engages in a discussion on deeper engagement in the philanthropic mission of the university

### Provides Mutual Benefits

*Foundation*

- Understanding of projected giving
- Clarification and rightsizing of expectations
- Unearths board member engagement and giving opportunities

*Board Member*

- Increased understanding of role
- Clarification of expectations of board service
- Executive level touch provides greater connections with senior foundation staff



Source: Advancement Forum interviews and analysis.

# A Summary Report and Tool to Guide the Discussion



## Engagement Assessment and Annual Philanthropic Activity

The University of Cincinnati Foundation

### Report Components

- Personal demographics
- UCF Board Involvement
- Giving Overview
- Trustee Volunteer Engagement
- External Affiliations
- Fiscal Year Financial Commitment

"As an annual practice, it reminds trustees of the roles and expectations of leadership and gives us another opportunity to thank you for your generous contributions of work, wealth and wisdom."

*Text in the introduction of the activity report*

"The board engagement scorecard is a worksheet for the liaison to sit down with the board member and explore in detail an engagement plan for the coming year."

*Donna Gastevich*
*Vice President for Advancement and Campaign Director*



Source: Advancement Forum interviews and analysis.

# Building a Culture of Accountability



## Couple Full Board & One-on-One Strategies to Ensure Ongoing Alignment

### Implementation Guidelines

**Make It Peer-Led**

Board chair, trusteeship chair, or full trusteeship committee should lead the initiative

**Make It a Two-Way Street**

Ask volunteers what else they need to improve their experience and fulfill expectations

**Substantiate with Data**

Include metrics (e.g., meeting attendance) to help translate qualitative/gut feelings into quantifiable figures

**Offer Opt-Out Option**

Give volunteers a non-punitive opportunity to self-select out of board role

Source: The Health Care Fundraising Board of 2020, p. 30; Philanthropy Leadership Council interviews and analysis.

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Source: Advancement Forum interviews and analysis.

# Prospect Brainstorming Lunches

## Perpetuating the Tyranny of Reciprocity

Lunch Time → Prompted Discussion → Information Exchange

### Lunch Time

**Representative Activities:**

- Positioned as a prospect brainstorming lunch
- Lunch held in a private room at a club
- One development officer assigned to each table of board members
- Table assignments based on professional and philanthropic interests (e.g., science research, student access)

### Prompted Discussion

**Representative Activities:**

- Development officers bring note cards with prospect information
- Cards divided across tables and used to prompt dialogue
- Cards with prospects interested in specific initiatives allocated to related table based on interest

### Information Exchange

**Representative Activities:**

- Board members share ideas about prospect's interest, business connections, and background
- Development officer takes notes on best cultivation strategies and immediate next steps
- Appropriate board member attendee enlisted in necessary follow-up with prospect

Source: "What No-one Else Can Do," *The Philanthropy Leadership Council, The Advisory Board Company*, 2013; Advancement Forum interviews and analysis.

# Making it Easy to Say Yes



## Encouraging Board Member Referrals

**Prospect Referral Excerpt**

**Your Name:** ______________________________ **Prospect's Name:** ______________________

**Residence (Summer):** ___________ **(Winter):** ________________ **(Other):** ______________

**Relationship:** _________________________ **Business:** ______________________________

| | Would You Be Willing To… | Yes | No | Maybe |
|---|---|---|---|---|
| **1 Proposal Development** | Work with staff to develop a custom proposal for this person? | ❑ | ❑ | ❑ |
| | Review and comment on the draft proposal? | ❑ | ❑ | ❑ |
| | Hand-deliver the proposal to this person? | ❑ | ❑ | ❑ |
| **2 Solicitation** | Attend a meeting with this person to discuss a proposal? | ❑ | ❑ | ❑ |
| | Attend a meeting with this person and ask them for a gift? | ❑ | ❑ | ❑ |
| | Sign a year-end appeal letter to this person? | ❑ | ❑ | ❑ |

Other areas to consider including:

- Qualification
- Cultivation
- Stewardship

Board members select different roles for each relationship and how they can participate in each specific step

Source: The Health Care Fundraising Board of 2020, p. 39; Advancement Forum interviews and analysis.

# Sourcing Names Translates to Gifts

## McLaren Northern Michigan Foundation Prospect Referral Form Successes

| ***Step*** | ***Total Actions Before Referral Form (2010)*** | ***Total Actions Post Referral Form (2015)*** |
|---|---|---|
| **Discovery/Introduction** | 2-3 | 25 |
| **Identification** | 1-3 | 30 |
| **Qualification** | 1-3 | 2 |
| **Cultivation** | 1-3 | 14 |
| **Proposal Development** | 1-3 | 6 |
| **Solicitation** | 1-3 | 247 |
| **Stewardship** | 1-3 | 126 |
| **Total Trustee Actions:** | 8-21 | 432 |

### The Power of the Referral

"The education around having the board understand that their true role is not just making a gift, but also helping us get in front of other people to make a gift and sending us referrals."

*Pam Bottge, Iona Forever Campaign Director, Iona College*

Source: The Health Care Fundraising Board of 2020, p. 39; Advancement Forum interviews and analysis.

# Learning from Unaffiliated Peers



## Meeting with Influential Philanthropists to Discuss Giving

**Key Logistics:**

- Board members tap their networks to identify key philanthropists
- Collective board visit to philanthropists office to discuss their giving
- Limited time commitment and board better understands the role of major philanthropists impact and giving

**Possible Discussion Questions:**

- Discuss the importance of your philanthropy
- What impact does your philanthropy have
- Why do you give?
- Why do you give to X institution?
- Where are there additional areas to grow philanthropic giving?

**Lunch-and-Philanthropy Session Outcomes**

- ✓ Increased connections
- ✓ Exclusivity and prestige
- ✓ Increased philanthropic understanding

> "How do you as a board member talk about why you give back, why you are a trustee, why you volunteer your time; getting them more comfortable with telling their story as an ally to advancement is key to our success
>
> *Pam Bottge*
> *Iona Forever Campaign Director*
> *Iona College*



Source: Advancement Forum interviews and analysis.

# Capture Details to Set the Stage



## Using a Storytelling Framework to Start the Conversation with Boards

### Get to Know Their Passions and Narrative

1. Who are you?
2. What do you do?
3. What are your passions?
4. How does it impact the campus, region, or world?
5. Why does it matter in this time and place?

Building board member narrative and confidence (questions 1–3)

Providing information for advancement to create a compelling case for donors (questions 1–5)

### Board Member Discovery Visit Logistics

Lasts 30-45 minutes

Occurs in their office, home, or at a board meeting

Conducted by a gift officer or communications staff

Source: Simmons A, *Whoever Tells the Best Story Wins: How to Use Your Own Stories to Communicate with Power and Impact*, New York: AMACOM, 2007; Philanthropy Leadership Council, "Story Building Framework for Prospect Conversations," *Philanthropy-Physician Partnership Toolkit*, Washington, DC: The Advisory Board Company, 2013, 71; Advancement Forum interviews and analysis.

# Preparation One Visit at a Time



## Assuaging Board Member Concerns Before the Visit

"Board members are smart people, they have made tremendous successes for themselves in their own work. Yet, for some reason they do not fully understand how those skills can translate to campaign fundraising. **Taking them on gift officer visits is a great way to open their eyes.**"

*Campaign Director*
*Private Research University*

"Board members don't often realize how impactful their story of why they volunteer to serve on the board can be with donors. We need to do a better job getting the board members, at all levels, not only comfortable telling their stories but giving them the platform to do so in visits."

*VP Advancement*
*Public Research University*

### Clarifying Roles, Goals, and Messages

Before meeting with a donor, brief board members on:

- Donor background information
- The goal for the meeting
- Who will do what during the meeting
- How the conversation will flow
- How to answer difficult questions

Source: Philanthropy Leadership Council, "Ally Storytelling Guide," *Resources for Charting Philanthropy's Path to 2020*, Washington, DC: The Advisory Board Company, 2015, 4; Advancement Forum interviews and analysis.

# Reflecting on Visit Execution

## Embedding Feedback and Coaching After the Visit

### Post-Visit Questions

Discuss the visit as soon as it is over, starting with the following questions:

- What key thoughts do you have about our interaction with the donor?
- What went well in this visit?
- What could we do better next time?
- What could I do to make the experience better for you?
- Do you have any specific feedback for me?
- Was our preparation helpful? What do we need to remember for the next visit?

### Effective Feedback

Share feedback about what did or did not go well using the following guidelines:

Ground comments in specific circumstances

Provide objective impressions and perceptions

Communicate impact or consequence

### Next Steps

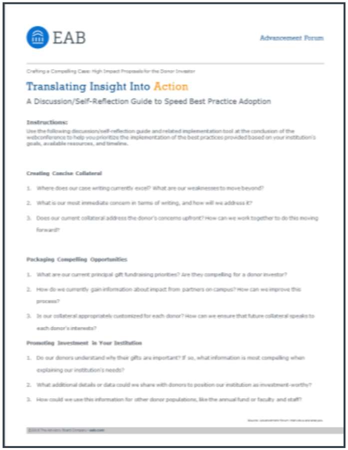
Strengthen relationships over time by keeping faculty in-the-loop:

1. Determine follow-up, including individual responsibilities and timelines
2. Inform board members about the final results
3. Publicly acknowledge the role of the board member in attaining the gift

Source: Seashore C, et al., *What Did You Say? The Art of Giving and Receiving Feedback*, Columbia: Bingham House Books, 1992; Philanthropy Leadership Council, "Ally Storytelling Guide," *Resources for Charting Philanthropy's Path to 2020*, Washington, DC: The Advisory Board Company, 2015, p. 6; Advancement Forum interviews and analysis.

# A Tool to Get You Started

## Discussion/Self-Reflection and Implementation Guide


EAB Advancement Forum

Crafting a Compelling Case: High Impact Proposals for the Donor Investor

Translating Insight Into Action

A Discussion/Self-Reflection Guide to Speed Best Practice Adoption

**Instructions:**
Use the following discussion/self-reflection guide and related implementation tool at the conclusion of the webconference to help you prioritize the implementation of the best practices provided based on your institution's goals, available resources, and timeline.

**Creating Concise Collateral**

1. Where does our case writing currently excel? What are our weaknesses to move beyond?
2. What is our most immediate concern in terms of writing, and how will we address it?
3. Does our current collateral address the donor's concerns upfront? How can we work together to do this moving forward?

**Packaging Compelling Opportunities**

1. What are our current principal gift fundraising priorities? Are they compelling for a donor investor?
2. How do we currently gain information about impact from partners on campus? How can we improve this process?
3. Is our collateral appropriately customized for each donor? How can we ensure that future collateral speaks to each donor's interests?

**Promoting Investment in Your Institution**

1. Do our donors understand why their gifts are important? If so, what information is most compelling when explaining our institution's needs?
2. What additional details or data could we share with donors to position our institution as investment-worthy?
3. How could we use this information for other donor populations, like the annual fund or faculty and staff?

- Assess how you currently engage board members
- Identify strengths and areas for improvement
- Select resources to distribute
- Prioritize practices to implement immediately or consider for the future

### Evaluating Today's Session

Please take a minute to complete our survey about today's webconference.

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Source: Advancement Forum interviews and analysis.

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