



Corporate and Foundation Relations

Maximizing Opportunities for Engagement and Giving

Advancement Forum

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Executive Summary

Advancement leaders are under pressure to grow philanthropic revenue from every available source. As a result, many chief advancement officers are increasingly concerned that their institutions are not maximizing giving from corporations and foundations.

However, the corporate and foundation philanthropy landscape has become more competitive in recent years. Corporations are building deeper partnerships with fewer organizations and supporting projects that contribute to their business goals. Foundations are limiting funding to projects with a defined scope and high potential for large-scale social impact, and they are prioritizing institutions with whom they have previously worked.

Despite this competitiveness, colleges and universities have key opportunities to expand current corporate and foundation relations (CFR) engagements and gain new partners through strategic investments and planning.

This white paper is organized in three sections to maximize your institution's unique potential for CFR growth.

1. Understand Your Institution's CFR Potential (p. 9)

Complete this opportunity diagnostic to determine where your institution has the greatest CFR potential. The results of the diagnostic will emphasize where to focus immediate efforts—maximizing current engagements or laying the groundwork for future success.

2. Maximize Current Engagements with One-Stop Shops (p. 10)

If your institution has already established successful partnerships with corporations and/or foundations, use the practices in this section to deepen current relationships. Creating a unified experience on campus will encourage external supporters to increase their engagement over time.

3. Lay Groundwork for Future Success (p. 15)

If you are in the early stages of building a CFR program or do not yet have substantial external partnerships, begin by engaging internal stakeholders. Explore the practices in this section to build a culture of collaboration among campus partners.

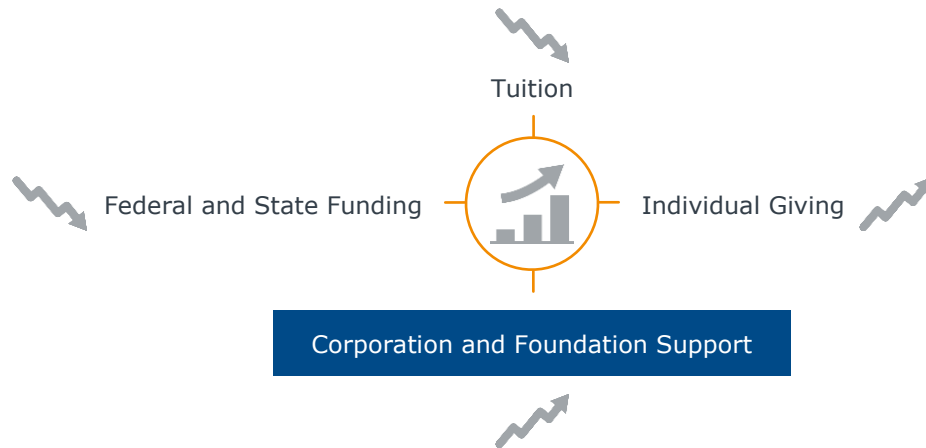
Introduction

Pressure to Maximize CFR Revenue

Growing Philanthropy from Corporations and Foundations

Faced with declining tuition revenue and government funding, advancement leaders feel increasing pressure to maximize philanthropy. They often consider how corporate and foundation support fits into overall advancement goals, and whether this source of philanthropy can be grown to increase overall revenue.

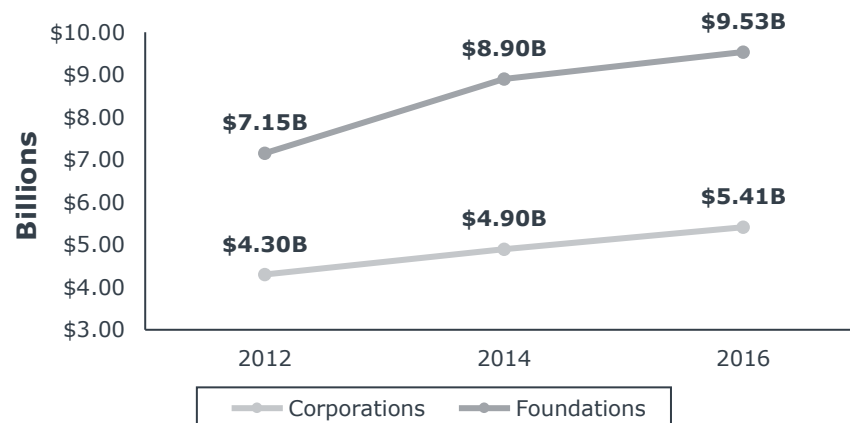
Looking for the Next Source of Budget Relief



Corporations and foundations appear to be positive targets for growing philanthropic support since they already comprise 44.5% of giving to higher education. Furthermore, support from both corporations and foundations has increased steadily since the Great Recession.¹

Corporate and Foundation Giving to Higher Education

FY2012-2016, Council for Aid to Education's Voluntary Support of Education Survey



1) Council for Aid to Education, Voluntary Support of Education Survey 2016, <http://vse.cae.org/>.

Limits to Growth Potential

Campus leaders assume this means they should see increased funding in the short-term from corporations and foundations. However, some advancement leaders are skeptical of CFR's potential to compensate for shrinking revenue due to a variety of forces, including: corporate giving strategies, foundation guidelines, Carnegie classifications, and uncertain economic growth.

Corporations Shift to Strategic Partnerships

Corporations are also adding new constraints to their own giving. Their giving strategies no longer favor widespread grants to numerous not-for-profits. Instead, today's corporate giving programs are defined by deep engagements with an ever-smaller number of partner organizations.

These corporate engagements are designed to do good while attaining business objectives, a move away from the traditional definition of philanthropy. As a result, advancement leaders are competing against countless colleges and universities for the pool of corporate support earmarked for higher education initiatives.



For example, Prudential Financial's social engagement formerly entailed small grants to local organizations. Today, the company proactively identifies partners across the United States and uses a variety of philanthropic and profit-generating resources to achieve profit goals and social impact.²

Prudential Financial Exemplifies Shift to Strategic Philanthropy

Strategic Investments Favor Small Number of Partner Organizations



As firms become even more strategic about social investments, advancement leaders will need to determine how far from traditional philanthropy they are willing to stray—and how they can help corporations go from one-time sponsors to all-in partners.

2) Wallace N, "Prudential's Charity Leader Feels Good About Focusing on the Bottom Line," *Chronicle of Philanthropy*, Oct. 3, 2017, https://www.philanthropy.com/article/Prudential-s-Charity-Leader/241341?cid=cpld_home.

Foundations More Selective than Ever

Like corporate philanthropy, foundation funding is increasingly challenging to attain. Colleges and universities struggle to network with program officers, meet reporting restrictions over time, and design programs that satisfy funding guidelines while meeting institutional needs.

Foundation Restrictions Outside of Advancement's Control



Institution type



Campus location



Faculty expertise



Student population



Driven by Guidelines, Not Proposals

"No matter how appealing a new program is, if it's outside a foundation's guidelines, nothing you say or do will get them to support it."

*Brad Bundy
Senior Associate Vice President and Campaign Director, Miami University*

Furthermore, many foundations find grantees proactively instead of soliciting proposals. For example, the Lumina Foundation independently identifies institutions working in its areas of focus, and then approaches them about possible projects instead of reviewing unsolicited proposals. This reduces the risks inherent in making grants to new organizations.³



Continuing the Support the "Usual Suspects"

"Most foundations are, by nature, risk averse. No one wants to make a dumb grant. ... That's why most foundations, when they find an organization that does good work, stick with that group for a long time."

*Trent Stamp
Chief Executive, Eisner Foundation*

Carnegie Classification Proves Decisive in CFR Revenues

Use the Opportunity Diagnostic (p. 9) to assess your institution's CFR growth potential.

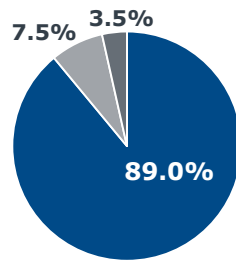
In the United States, corporations and foundations overwhelmingly support research universities, with much less funding going to master's and baccalaureate institutions. The research enterprises at R1 institutions have size, scope, and depth that appeal to external supporters, and that other institutions cannot match.

3) Stamp T, "To Become a Better Grantmaker, Rethink Everything," *Chronicle of Philanthropy*, Jan. 4, 2017, https://www.philanthropy.com/article/Opinion-To-Become-a-Better/238782/?key=xuZrQyqIpCLExXQCLAgSzLyVgTg7KyFL-fq34d_LIozlDJ0SjFRQd2wC9zVOgl16WU9VUW1sZDdYd05qTkxFWGVMM2x1UXN5d0FwMDA0aVBrWUJ5VHd4b2hUaw.

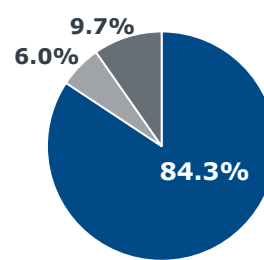
Majority of Philanthropy Directed to Research Institutions

Voluntary Support of Education by Institution Type, FY2016⁴

Corporate Support



Foundation Support



Baccalaureate colleges and master's universities benefit from small portions of corporate and foundation giving, but they are less likely to be able to make large gains in this sector. Plus, increasing the resources allocated to research could cause them to stray away from their core missions of teaching and social engagement.

Economic Growth Remains Unpredictable

Trends in corporate and foundation giving make it appear that growth will continue indefinitely, but leading advancement staff recognize that the economy plays an outsized role in determining how much corporations and foundations will give.

According to the Giving USA Foundation, there is a significant correlation between changes in total corporate giving and values on the Standard & Poor's 500 Index.⁵ When the stock market is weak (or profits and investment income do not increase), foundations and corporations are less likely to increase their giving.

Economic Factors Influence Corporate and Foundation Giving



Stock Performance



Pre-tax Profits



Endowed Asset Value

Furthermore, the United States Tax Cuts and Jobs Act of 2017 reduces incentives for corporations to increase their philanthropic contributions. It is estimated that corporate giving could decline by as much as 7.6% in the first year of implementation, a potential reduction of \$1.4 billion per year.⁶

These recent legislative changes combined with economic uncertainty make it challenging to rely on CFR as a consistent source of giving year-over-year. To succeed in CFR, advancement leaders should evaluate their unique opportunities before making additional investments.

4) CAE Voluntary Support of Education Survey.

5) Giving USA 2017 Report.

6) Rooney, P. "How the Tax Package Could Sap the Flow of Charitable Giving," The Conversation, Dec. 6, 2017, <http://theconversation.com/how-the-tax-package-could-sap-the-flow-of-charitable-giving-88513>.

1. Understand Your Institution's CFR Potential

Opportunity Diagnostic

Assess Potential Before Setting New Strategies

Opportunities for corporate and foundation support are limited by forces outside of advancement's control, including an institution's location, faculty research priorities, and alumni career paths.

Before setting new strategies or reallocating investments for CFR, complete the following diagnostic to determine the size of the opportunity at your institution.

Diagnostic Instructions

For each connection to corporations and foundations listed in the table below, place a checkmark in the column that best describes its status at your institution.

Current Corporation and Foundation Connections

Criteria	Yes	No
R1 (highest research activity) Carnegie classification or potential to be classified as such in near future		
Corporate headquarters near campus		
Regional foundations' interests aligned with campus priorities		
Alumni and other contacts in C-suite roles at national corporations		
Alumni and other contacts on boards of national foundations		
On-campus recruitment for full-time employment and internships		
Large-scale athletics sponsorships		
Sponsored research projects		
Philanthropic gifts from campus vendors		
Workforce development programs for local employers		
Grants from national foundations		
Total checkmarks per column		

Analyzing the Results

After completing the diagnostic, add the checkmarks in each column:

- If you have six or more checkmarks in the "Yes" column, consider how you can deepen current relationships before investing in new pursuits.

See **"Maximize Current Engagements with One-Stop Shops"** (p. 10) for practices to deepen existing CFR partnerships.

- If you have six or more checkmarks in the "No" column, focus on building strong relationships among campus partners before pitching opportunities to new CFR prospects.

See **"Lay Groundwork for Future Success"** (p. 15) to engage campus stakeholders and lay critical groundwork for new corporation and foundation investments.

2. Maximize Engagements with One-Stop Shops

Establish a Single Point-of-Entry

The New Standard for CFR Success

The areas on campus with corporation or foundation connections, including sponsored research, philanthropy, and employer relations, are often housed in separate divisions with different contact people for external partners. Yet corporations and foundations seek a single point-of-entry to ask questions and identify new opportunities.

Numerous Points of Contact Cause Confusion for External Partners



“One-Stop Shops” Create Single Gateway to Campus



Creating a “one-stop shop” can be resource intensive and requires stakeholders on campus to cede some responsibilities to CFR staff in order to ensure its success. Before establishing an independent one-stop shop, CFR staff can lead initiatives that achieve many of the goals of a one-stop shop. This includes streamlining data, presenting a unified web presence, and investing in staff to strategically expand existing relationships.

Streamline CFR Data

Inventory Current Engagements

Information about CFR relationships is often housed in multiple campus locations. Vice Presidents for Research and their staff have deep corporate partnerships through sponsored research projects. Research offices also manage government grants and may be in contact with national foundations. Without coordinating with research administration, CFR staff cannot comprehensively evaluate ongoing engagements, and campus partners cannot follow a consistent strategy when approaching external partners.

At Purdue University, advancement and research staff worked together to create a **partnership dashboard** that tracks a corporation's engagements across campus. To create the dashboard, staff from research and CFR worked together to assemble a database identifying every touchpoint that a corporation has on campus, from advancement to research, career services, and professional education.

Unified Database Prevents Communication Issues

Before Dashboard

-  Excessive time required to identify main points of contact
-  Information spread across multiple systems
-  Outdated or unverifiable data on partnerships

After Dashboard

-  Database has search function and clearly-labeled key contacts
-  Single repository of data combined from multiple systems
-  Information updated in real-time and routinely synced for accuracy

Assembling the database was the first time that these stakeholders came together to aggregate corporate partnerships data. Afterwards, data access and editing permissions were assigned to staff across campus to ensure that the data is updated consistently.

The updated database allows CFR staff to see a complete picture of current engagements. It is also communicated to internal partners that working together will be necessary in order to maintain and expand corporate partnerships, particularly for companies that already have multiple engagements on campus.

Centralize Information Online

A User-Friendly Experience for All Stakeholders

After organizing internal data, create a web portal that provides an easy-to-navigate experience for external partners. Websites at institutions of higher education often present a variety of partnership opportunities and numerous points-of-contact. This makes institutions appear disorganized—and corporations will move on to other partners.

The University of Louisville's **centralized web portal** prevents this confusion. The portal provides the impression that there is a one-stop shop for corporate and foundation relations by providing a menu of potential partnership opportunities and contact information for each area. Drop-down menus are organized based on the reasons why a corporation may be interested in a partnership.⁷

7) See the full portal at www.louisville.edu/research/innovation.

Centralized Web Portal Provides One-Stop Shop Experience



The web portal is “self-service” in nature—potential partners identify their own goals and where they want to engage first on campus, and then reach out directly to the best contact person for that priority. This allows all staff on campus to focus on a partner’s stated priorities, instead of trying to guess where they would like to engage first.

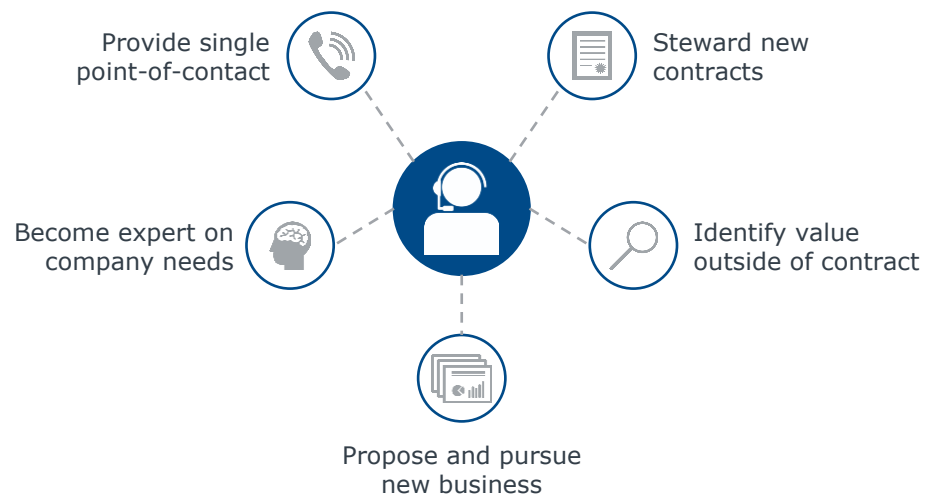
Identify a Main Point-of-Contact

Staffing for Strategic Relationship Expansion

To deepen existing CFR relationships, additional investments could include staff responsible for identifying how to increase investments from current partners. These staff members should take responsibility for deepening external partnerships over time.

The Georgia Institute of Technology (Georgia Tech) established a **relationship concierge** for corporate partners. Full-time staff serve as the main point of contact for corporate partners and are responsible for finding additional value within the ongoing partnership. Success is evaluated based on both deepening current relationships and establishing partnerships with new corporations.

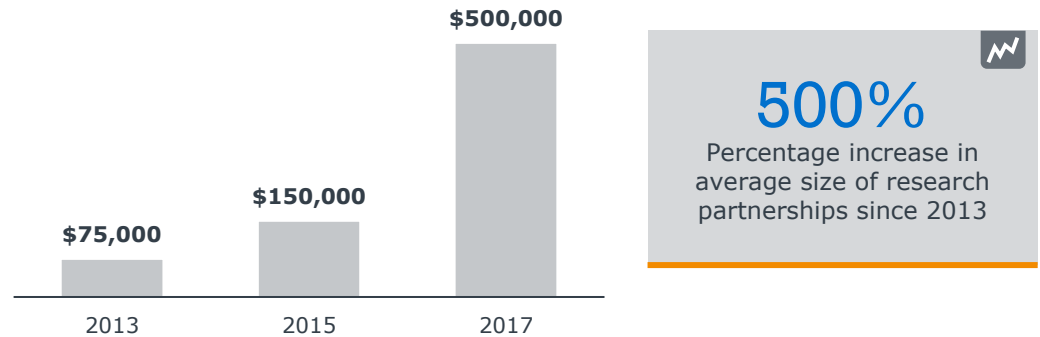
Relationship Concierge Increases Value for Corporate Partners



The relationship concierge does not need to be housed in a separate division on campus. These staff members are ideally-positioned to work across campus departments to increase corporate engagement. If housed within advancement, they could lead efforts to increase collaboration among all campus partners.

Relationship Concierge Model Increases Corporate Investments

Average Size of Research Partnership Programs at Georgia Tech, 2013-2017



Concierge staff at Georgia Tech ensure that all corporate partners receive the same level of service, regardless of which departments they work with on campus. Adding these relationship managers has increased the value of the average research partnership at Georgia Tech and ensured that corporate expectations are met at every step of the process.

Establish a One-Stop Shop

Optimize the Corporate Engagement Experience

Moving beyond small staff investments, institutions with the potential to greatly expand corporate relationships should consider establishing a true one-stop shop. For corporations, a one-stop shop makes it easy to access university resources, and can accelerate the speed at which engagements begin.⁸ When a corporation evaluates engagement opportunities at multiple colleges or universities, a one-stop shop could make the difference between competing institutions.

The Massachusetts Institute of Technology (MIT) **Industrial Liaison Program** is supported by over 50 staff members and serves the sole purpose of connecting corporations around the globe with MIT's programs and expertise.⁹

Campus-Wide Knowledge Housed in One-Stop Shop



8) "Metrics for a Successful Twenty-First Century Academic Corporate Relations Program," NACRO, Aug. 2, 2012, http://nacron.org/sites/default/files/NACRO_whitepaper_metrics_for_success.pdf

9) MIT Industrial Liaison Program, <http://ilp.mit.edu>.

The industrial liaison program takes the lead in connecting corporations to any opportunity in which they are interested on campus, from faculty members and labs to campus startups and student recruitment programs. The program also sponsors events for corporate partners to network with each other, as well as connections to professional education programs that may interest external supporters.

MIT's one-stop shop also takes responsibility for promoting MIT to prospective partners, including hosting a comprehensive website and creating marketing collateral that demonstrates the Institute's strengths and value to corporate partners.

Considerations for Establishing a One-Stop Shop

- ☒ To whom will the team report? How big should the team be?
- ☒ Who will provide funding? Who will set team goals?
- ☒ What constitutes success? How will it be measured?
- ☒ What is the timeline for attaining success?

3. Lay Groundwork for Future Success

Collaborate with Key Partners

Competing Connections Highlight Need for New Approach

For institutions that are not yet ready to establish a one-stop shop, future success depends on strong partnerships across campus. Deans, faculty members, career services, and other campus stakeholders have an opportunity to work together to craft proposals, identify engagements, and steward funders.

Many of these stakeholders already have connections to corporations or foundations. Researchers, career services, and athletics staff may independently build their own networks. Instead of coordinating with each other, they may fear that sharing their contacts will result in frustration, decreased funding, and broken relationships.

Proliferation of Stakeholders Seeking External Support



Vice President, Research



"We need to replace federal funding with private support."



Chief Business Officer



"All of our vendors should be solicited for gifts."



Director, Career Services



"We need to expand our footprint with national firms."



Director, Athletics



"The new stadium needs a corporate sponsor"

Given the increased competitiveness for corporate investments and foundation support, a coordinated approach is required in order to sustain CFR success over time. Leaders across campus need to work together to ensure success, and CFR staff should contribute their cultivation and stewardship skills to the efforts of all partners.

Educate Deans

Refocus Deans' Proposals on Current Operations

To jumpstart this collaborative approach, CFR staff should begin by proactively approaching deans and other campus leaders. Deans often work with external partners, and encourage their faculty members to do the same—yet they may not understand what makes a proposal compelling to a corporation or foundation. CFR staff play a key role in setting realistic expectations about what these prospects are willing to support at institutions of higher education.



Deans Unaware of What Appeals to CFR Prospects

"I have a dean who wants to ask all of the corporations in our area to name a new building. He doesn't understand that they're not interested in supporting capital projects at universities."

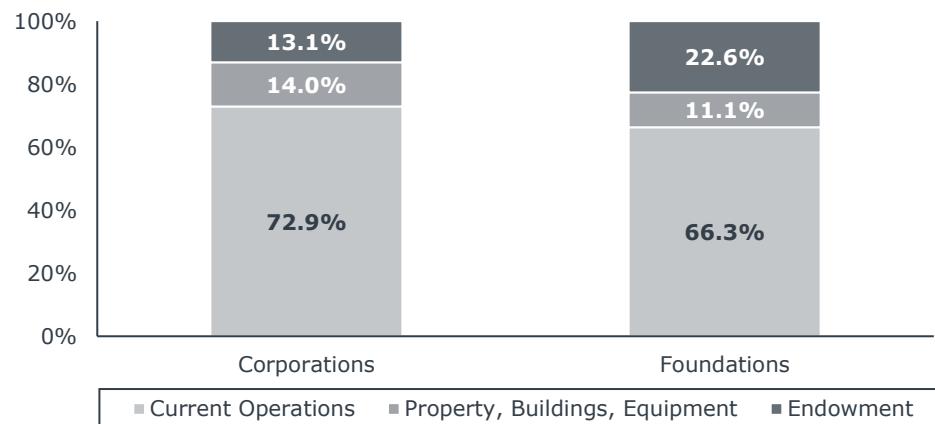
Assistant Vice President, Principal Gifts, Public Research University

To show deans (and other campus partners) what proposals to prioritize for corporations and foundations, host a **campus roadshow** with data and stories about successful CFR proposals. The roadshow can be a standalone presentation, a part of leadership retreats, or an on-demand session as needed by academic divisions.

When creating the presentation, use the data below as a starting point to show that the majority of corporate and foundation giving goes to current operations, not buildings or endowments. Then, include data on gifts to your institution to show how this trend holds true on your campus.

Corporations and Foundations Favor Giving to Current Operations

Average Support to Institutions of Higher Education, FY2016¹⁰



Use the sample talking points (below) to create an agenda for the campus roadshow that explores the potential offered by CFR, while clarifying the roles that campus partners and CFR staff play in ensuring long-term success.

Provide opportunities for attendees to share success stories, ideas for future proposals, and questions about how they can strengthen their work with external partners. This allows academic partners to learn from each other, and keeps CFR staff informed about their current research initiatives. Staff can use this information to connect current prospects to faculty working in their areas of interest.

Campus Roadshow Sample Talking Points



Presenter: director of corporate and foundation relations

Target audience: deans, department chairs, center directors

- ☒ Impact of CFR in funding institutional priorities
- ☒ Philanthropic priorities of corporations and foundations
- ☒ Current prospects and local competitors for external support
- ☒ Academic partners' role in CFR pursuits
- ☒ Sharing success stories, tips, and proposal ideas

¹⁰) CAE Voluntary Support of Education Survey.

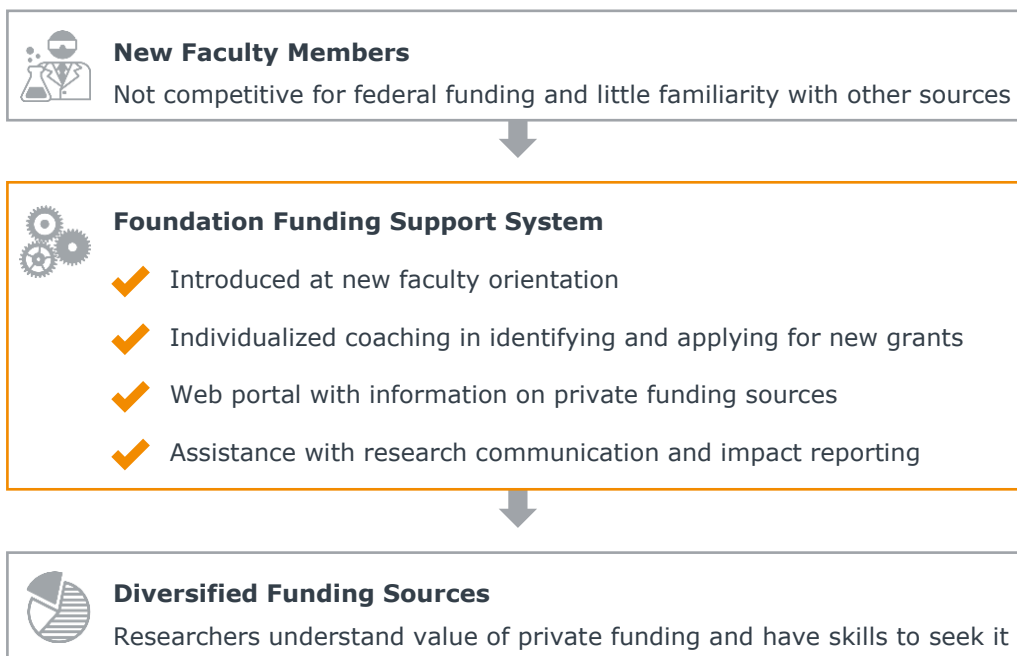
Enfranchise Faculty

Encourage Faculty to Identify and Approach Foundations

After educating deans about the possibilities within CFR, staff should proactively connect with faculty members seeking research funding. In particular, many foundation grants are earmarked for early- to mid-career faculty members, yet these researchers may not know how to prepare a proposal for private support.¹¹

The University of California, San Diego supports these new faculty members with a **foundation funding support system**. CFR staff founded the program to assist new researchers in identifying and applying for foundation grants.

Support System Provides Resources and Individualized Assistance



In the program's first year, it generated an additional \$4 million of funding for early-career researchers. These grants were unlikely to have been identified by researchers seeking funding without the program's support.

Foundation funding accelerated the rate at which new researchers could staff and stock their labs, making them eligible for federal grants in the future. The program also creates a generation of faculty who have the knowledge and skills to pursue funding from non-federal sources if federal research funding declines.

Coordinate with Career Services

Expand Corporate Mindshare Beyond Recruitment

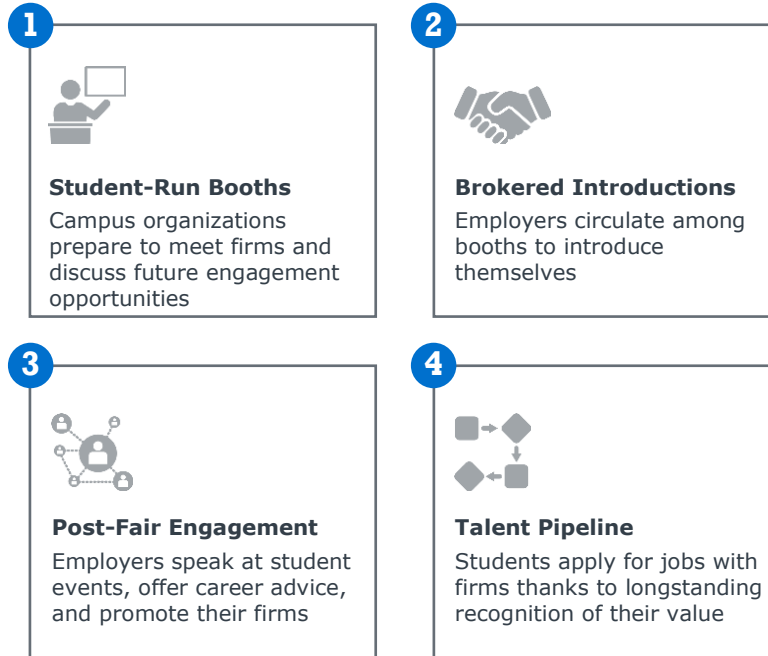
In addition to working with the academic enterprise, CFR staff should collaborate with career services, which often has links to numerous employers. Yet career services staff members may not actively think about opportunities to expand corporate partnerships beyond student employment opportunities.

To show employers how else they can engage on campus, Oklahoma State University holds an annual **reverse career fair**. At the fair, student organizations staff booths and corporate recruiters have the opportunity to walk around, meet students, and hear about what organizations are doing on campus.

11) Winslow S et al., "For the Greater Good: Boosting the Value of Industry Partnerships," EAB University Research Forum, 2017.

The fair is held on the morning of the traditional career fair so that recruiters only have to make one trip to campus. Recruiters have to walk through the reverse fair in order to access their booths for the traditional career fair, leading to a 100% attendance rate.

Key Elements of the Reverse Career Fair



After meeting students at the reverse career fair, corporations remain engaged on campus by working with student groups to sponsor events, provide guest speakers, and create mentoring opportunities. This allows employers to promote employment opportunities throughout the year, making them top-of-mind when students apply for jobs and internships, and keeping the college or university top-of-mind for the employer.

Use the Corporate Engagement Tracker (p. 23) to identify where corporations are active on campus after the fair.

To ensure that corporations remain engaged after the fair, CFR staff should determine who on campus will follow-up with participating employers to identify additional opportunities for them to connect with students or engage with other campus stakeholders. Brokering additional introductions also shows career services colleagues how CFR staff are partners, not competitors, in seeking additional corporate support.

Positive Outcomes for All Participants

“Employers are looking for any additional ways to differentiate themselves, to uniquely market themselves, and to network. Frankly, they want any way to engage on campus over the long term. It’s been a successful vehicle for that, and the students love it.”

*Philip Goodwin
Associate Director, Employment Relations, Oklahoma State University*

Making the Reverse Career Fair Work on Your Campus

- ✓ Connect with Career Services staff to determine date and location
- ✓ Identify alumni entrepreneurs to invite
- ✓ Explain concept to student organizations to build enthusiasm
- ✓ Broker introductions between startups and on-campus recruiting managers
- ✓ Follow-up with student and employer participants for ongoing engagement

Communicate with Athletics

Bundle Engagements to Increase Support

After working with career services and academic partners, CFR staff should focus on opportunities to partner with athletics. Corporations increasingly want to sponsor priorities across campus, but athletics staff often maintain an “athletics first” focus—they only negotiate sponsorships for athletics, and CFR staff are rarely participants in the process. When corporate relations in athletics is outsourced to a marketing firm, external account managers have few incentives to work with the CFR team to bundle multiple priorities into one sponsorship agreement.

Common Challenges to CFR-Athletics Coordination



Incentives

No protocols for shared credit between athletics and CFR



Communication

Limited awareness of ongoing negotiation or potential prospects



Infrastructure

Different systems do not communicate opportunities across campus

Moving forward, CFR staff and advancement leaders need to show athletics staff how working together allows all participants to reap greater rewards than working alone. Sponsorship negotiations at institutions of all sizes should include partners across campus, so that corporations see numerous engagement opportunities upfront. This provides avenues to maximize a company’s visibility on campus while increasing revenue for the college or university.¹²

Breaking Down Silos for Better Relationships

“If we pool our relationships rather than (taking) the traditional siloed approach, which you see on many university campuses... The outcomes can be really special for a lot of stakeholders. If everyone works together, one plus one could equal four or six.”

*Solly Fulp
Former Executive Director, University Business Partnerships and Services
University of California, Berkeley*

¹²Berkowitz S, “Universities Follow Athletics’ Lead in Bundling Sponsorships,” *USA Today*, June 25, 2015, <https://www.usatoday.com/story/sports/college/2015/06/24/california-berkeley-sponsorship-athletic-department-sungevity/29210649/>

Joint Proposals Benefit All Campus Stakeholders

Current Practice Limits Possibilities for Campus Partners



Joint Proposals Extend Benefits to All



To improve partnerships with athletics (or build them from scratch), CFR staff should explain the benefits of working together. These conversations should include clarifying where athletics and CFR staff responsibilities intersect, and where each division is pursuing different objectives.

Advancement-Athletics Partnerships Increase Giving to All

Benefits for Campus Stakeholders

-  Coordinated prospect outreach and negotiation
-  Integrated strategy across multiple campus units
-  Larger proposals include more revenue for all

Benefits for Corporate Partners

-  Increased brand visibility on campus
-  Clear points of contact for questions and concerns
-  Ability to support multiple company priorities at once

Regardless of whether athletics sponsorship staff is based on campus or at an outside firm, advancement leaders need to keep lines of communication open and share intelligence about prospects who could be interested in both athletics and non-athletic engagements. Taking each side's strategy and goals into consideration ensures that athletics and CFR staff work as a team, avoid missteps, and gain a greater share of a corporation's investments.

Guiding Questions for CFR-Athletics Coordination

Use the following questions to continue the discussion with partners in athletics:



Ongoing Communication

- How often will we communicate updates to each other?
- What forms of communication will we use?
- Who on our teams will be responsible for communicating urgent information?



Current Sponsors

- How are you stewarding current sponsors? What is working well? What could be improved?
- Are there any athletics sponsors who are likely to be interested in supporting programs elsewhere on campus? When can CFR staff present those opportunities?



Future Prospects

- How will we inform each other of new prospects?
- What strategies should we use to ensure that prospects are open to supporting engagements in athletics and elsewhere on campus?
- How can we manage contract negotiations to ensure maximum revenue for all partners involved?

Leverage the Board

Systematically Identify Foundation Leads

Moving beyond athletics and other internal partners, CFR staff should think creatively about how to leverage the networks of trustees and key volunteers to gain access to corporation and foundation leaders. Board members often have deep connections to high-ranking individuals within national and regional foundations and corporations, and it is difficult for colleges and universities to gain access to them without using insider networks.

Use the Board Member Leads Generator (p. 24) to customize the form for your board members.

CFR staff at Providence College realized that board members often had close relationships with foundation decision-makers and expected the College to pursue projects with them. However, staff had never systematically collected information regarding who knew whom. In order to ask about connections in a non-obtrusive way, the CFR team created a **board member networking form** that is distributed at in-person board meetings.



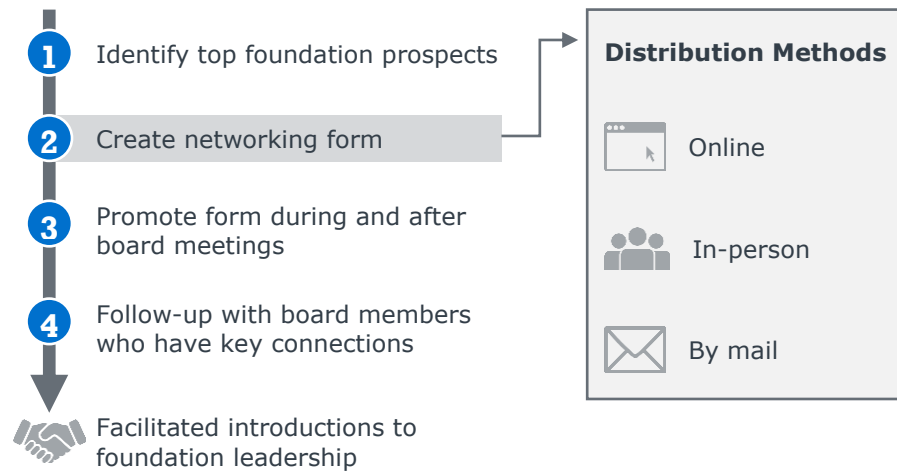
Board Members Hold Unrealistic CFR Expectations

"A lot of folks think that there's this never-ending pool of foundation dollars, or that corporations are all giving to someone, so there's no reason that they shouldn't be giving to us over institution A, B, and C."

*Andrea Keefe
Director, Major Gifts, Providence College*

Instead of asking board members about every possible foundation, CFR staff curated a list of top foundation prospects—25 national foundations and 25 local foundations that were likely to be interested in the College’s projects and priorities. This showed board members that not every foundation is a potential target for future grants.

Deploying the Board Member Networking Form



Use LinkedIn to surface additional trustee networking connections.

When a board members identifies connections at a foundation, staff follow-up is crucial—trustees may need to be asked to introduce university staff to foundation leaders. In the future, CFR staff will be able to refer to the forms to find connections at foundations they are newly interested in approaching.

Tool 1: Corporate Engagement Tracker

Instructions

Identify where corporations are currently involved on campus to cement long-term engagement and giving. After a career fair or similar event, track campus engagement among participating companies by monitoring campus schedules, publications, and LinkedIn. The tracker can be assigned to a staff member or student worker.

If a corporation has many *ad hoc* touchpoints on campus, determine how to strategically increase their investment in your institution.

Sample Corporate Engagement Tracker

Corporation Name: _____	
Tracker Assigned to: _____	
Main Contact: _____	
Email: _____	
Phone: _____	Best Method for Outreach: _____
Activities on Campus	
Date(s): _____	
Description: _____	

Date(s): _____	
Description: _____	

Date(s): _____	
Description: _____	

Date(s): _____	
Description: _____	

Date(s): _____	
Description: _____	

Proposal for Additional Engagement/Giving Assigned to: _____	

Tool 2: Board Member Leads Generator

Instructions

Use this form to identify board members with connections to corporations and foundations that could engage with your institution. To create the form, list your institution's top foundation and corporation prospects.

Explain to board members why it is important to identify these connections. Then, distribute the form to each individual. Be sure to provide space to add additional connections to the list. Follow-up individually with board members who have strong connections to decision-makers at top prospect organizations.

Sample Leads Generator Form

Note: Development staff will reach out to you before contacting the individuals listed below. No communication will take place without your permission.

Board Member Name: _____ **Date:** _____

	Top Prospects	Connection to Organization
Corporations	1.	
	2.	
	3.	
	4.	
	5.	
	6.	
	7.	
	8.	
Foundations	1.	
	2.	
	3.	
	4.	
	5.	
	6.	
	7.	
	8.	
Additional Connections	Write-in: _____	
	Write-in: _____	

Are you willing to facilitate development introductions to these individuals?

☐ Yes

☐ No

Advisors to Our Work

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