

Incentivizing Collaboration Across Campus

Corporate and Foundation Relations Metrics Compendium

In addition to pursuing annual dollar goals, CFR staff should engage campus stakeholders in development and deepen external partnerships beyond philanthropy. To ensure long-term success, update performance metrics to incentivize these CFR-specific activities.

Using the Compendium

Use the following metrics as a starting point to determine expectations and define success for staff within CFR or on a dedicated corporation/foundation liaison team. The list can be modified to fit the responsibilities and goals for staff at your institution.

Category	Potential Metrics
Advancement Connections	☐ Informing frontline fundraisers and other relevant staff about current faculty research and projects ☐ Sharing data and resources for proposal creation and stewardship ☐ Sourcing CFR leads from current donors/volunteers ☐ Write in: _____
Campus Partners	☐ Meetings with research administrators ☐ Communication with faculty members ☐ Leading CFR information sessions or trainings for academic partners ☐ Maintaining centralized partnership data ☐ Developing "one-stop shop" web portal ☐ Write in: _____
Current CFR Engagements	☐ Stewardship and impact reporting ☐ Creating strategies to increase support from current partners ☐ Additional campus engagements for current partners ☐ Additional revenue from current partners (including soft credit for revenue not counted as philanthropy) ☐ Write in: _____
CFR Prospects	☐ Identifying prospects and sourcing leads ☐ Targeted campus visits and interactions with senior leadership ☐ Pinpointing mutual needs and opportunities for engagement ☐ Ongoing communication and eventual solicitation ☐ Contract negotiation and closing ☐ Write in: _____
Defining Success	☐ Feedback from internal and external stakeholders ☐ Modifying engagements to meet partners' needs over time ☐ Improving processes to streamline partnership experience ☐ Assessing future opportunities and prioritizing biggest areas for growth ☐ Write in: _____