



Sustainably Sourcing Big Ideas

The Donor Investor Imperative Part Two

Advancement Forum

Donor Investor Imperative Webconference Series



Part Two of a Four-Part Sequence

1

The Rise of the Donor Investor
Available on-demand at eab.com

2

Sustainably Sourcing Big Ideas

3

Communicating the Impact of Big Ideas
March 8

4

Perfecting the Pitch to Appeal to Today's Donors
March 29

▶ **Register for forthcoming webconferences at:**

<https://www.eab.com/research-andinsights/advancementforum/events/webconferences/2017/the-donor-investor-imperative>

Donors Seek Compelling Ideas



MacArthur Foundation Sets the Bar

100&Change

Our Strategy

100&Change is a MacArthur Foundation competition for a \$100 million grant to fund a single proposal that promises real and measurable progress in solving a critical problem of our time. We will consider proposals from any field or problem area.

Our Approach

Some problems cannot be solved by grants of the size that foundations typically provide. By a level far above what is typical in philanthropy, we can address problems and support solutions radically different in scale, scope, and complexity. \$100 million is a large enough amount to tackle a serious problem and its solution in a meaningful and lasting way. We hope that 100&Change conversation about solutions and about how we can solve some of our most significant problems.

The openness of the 100&Change competition is a counterbalance to the Foundation's big bets that strive for transformational impact in areas identified by the Foundation's board and staff. We recognize that we do not know it all and have designed 100&Change to be agnostic with respect to field or problem area.

We are seeking proposals that articulate both a problem and its solution. Competitive proposals must address a meaningful problem and provide a solution that is verifiable, durable, and feasible.

The Selection Process

We have designed a selection process that is fair, open, and transparent. In the first round, panels of external judges will review and score proposals using a common rubric. Based on the reviews, up to ten semifinalists will be asked to provide further details about their proposals and engagement with targeted communities. The semifinalists will also receive technical assistance from an expert team who will assess and advise plans for implementation of the proposed solution. From this group, a smaller number of finalists will be selected. These finalists will present their solutions at a public event in the fall of 2017. Selection of the final award recipient rests with MacArthur's Board of Trustees.

Specific terms and conditions are available on the [competition website](#). The competition is open from Thursday, June 2, 2016; applications are due no later than Monday, October 3, 2016, at 11:00 a.m. Central. However, you must first register by Friday, September 2, 2016, at 11:00 a.m. Central.

\$100M grant competition open to anyone in any field anywhere

Goal of solving "a critical problem affecting people, places, or the planet."

Impact must be "meaningful, verifiable, durable, and feasible."

Transparent selection process

Others Follow Suit



“By making big bets today, we will dramatically expand opportunities for all.”

- ▶ Goals: advancing human potential and promoting equal opportunity
- ▶ Focus areas: science, education
- ▶ Researchers, advocates, engineers, and scientists work together to find breakthroughs and create new technologies



A Lack of Ideas on a Grand Scale

Desperately Seeking Projects to Inspire Donors

“What I’m not finding at our institution are enough big ideas that will take the \$1M gift and make that next gift \$5M. The ideas are very operational. They’re not thinking longer-term or coming to me and saying “if I had a \$20M gift, I could do X, Y, and Z.” We’re just not seeing those conversations emerge.”

*Vice President, Development
Public Research Institution*

Why Finding Big Ideas Is Hard

Too Many Ideas, Not Enough Filters

Idea Sources

Institutional Challenges



Donor Interests

- Idiosyncratic
- Mismatch with institutional needs
- Unrealistic expectations

"The donor wants to start a new college, but we'll never be great in that area."



Deans' Needs

- Focus on today's operations
- Limited vision for tomorrow
- Unappealing to donors

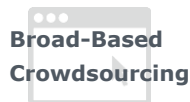
"Donors don't want to pay to clean the carpets and keep the lights on."



Faculty Pet Projects

- Perceived as advancement "playing favorites"
- Difficult to sustain over time
- Unaligned with CBO priorities

"Faculty only care about their tiny corner of the universe"



Broad-Based Crowdsourcing

- Mixed quality of ideas
- Unrealistic plans
- Unsustainable over time



Bringing Order to Chaos

Developing a Process to Capture Big Ideas

Six Steps to Sustainably Source Big Ideas



Case Exemplars





Advancement Runs the Playbook, the Provost Leads

The Right People and Roles



Chief Advancement Officer

Initiates the process, directs team for eventual solicitations



President

Ensures alignment of big ideas to strategic priorities



Provost

Leads big ideas process



Chief Business Officer

Allocates funds for big ideas



Vice President, Research

Links big ideas to research enterprise



Deans

Encourage faculty participation

“**The Provost is critical to dean and faculty engagement.** He has to place value on it and create an expectation around it—advancement cannot force it. If we can demonstrate that there is potential opportunity for significant philanthropic investment, then it’s an easier sell to the faculty; but it has to be supported by the provost.”

*Jane DiFolco Parker
Vice President, Development
Auburn University*

“**This was the first time this group of campus leaders had come together** to focus on generating ideas that philanthropy could fund. They originally didn’t understand why they needed to be involved. It set the stage for a unified approach.”

*George P. Watt, Jr.
Executive Vice President,
Institutional Advancement
College of Charleston*

Kicking Off the Process

Engage Academic Leadership Constructively and With an Agenda and Goals

Big Ideas Kickoff Session Agenda

I. Introduction

- Purpose and goals
- Everyone's role

II. Setting Criteria

- Sample criteria
- Key questions to define a big idea

III. Choosing the Best Ideas

- Decision method
- Creating a points system

IV. Starting the Process

- Timelines for implementation
- Next Steps

Tips to Aid the Process to Initiate Big Ideas on Your Campus

Session can be co-facilitated by the Provost and Chief Advancement Officer

Think about criteria *without* focusing on philanthropy in order to surface the best ideas on campus

A transparent process builds positive working relationships with academic partners who participate in the process



Forthcoming Toolkit



Create Evaluative Criteria for Your Institution



Ensuring Success By Clarifying What is Expected

A Big Idea Should:

- Transform the University and the world
- Make the University unique in the marketplace
- Focus on where the University is good but could become better
- Include areas where the University is emerging as a leader

A Big Idea Should Not:

- Be defined *solely* by a capital project
- Bundle together smaller ideas
- Solely feature a naming opportunity
- Lead to slow, incremental improvement

Key Information to Objectively Review Ideas



UNIVERSITY OF OREGON

Ensuring RFP Provides Necessary Information

Faculty required to explain:

- Alignment with mission and academic plan goals
- Building on existing academic strengths
- Fostering interdisciplinary collaboration
- Links to fundamental societal challenges or opportunities
- Viable funding model, including philanthropy and institutional funding
- Sustainability beyond three to five years

Questions to Create an Institution-Specific RFP



Institutional Niche

- How does this take advantage of our existing strengths?
- How does this make us unique, or differentiate us in the marketplace?
- How will this make a difference on campus in the long-term?
- Which regional or global problems does this initiative solve?



Implementation Thresholds

- How much is this idea worth?
- Could this idea be funded through philanthropy or other outside sources?
- How will funding be sustained over time?
- How will the project use both existing and new resources on campus?

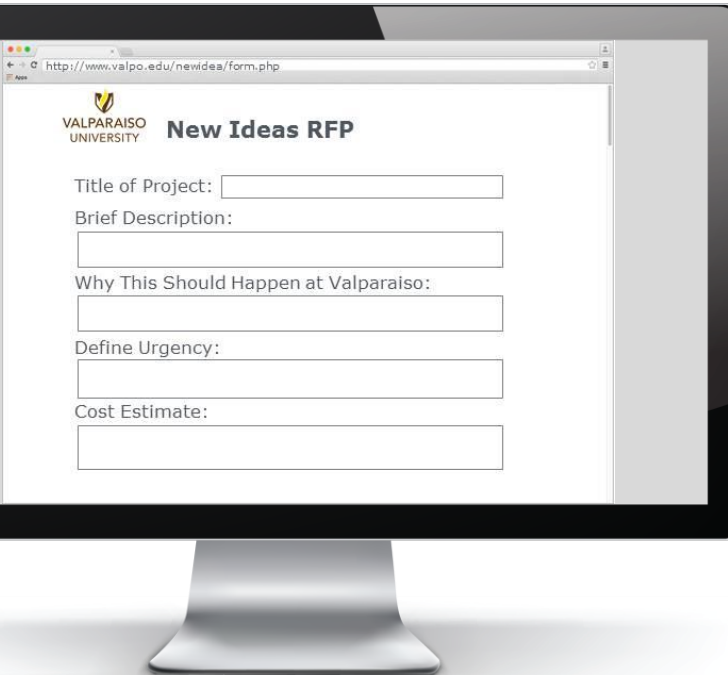


Forthcoming Toolkit

Making Idea Submission Easy

Grounding Big Ideas in Reality

Valparaiso University's Online Submission Form



http://www.valpo.edu/newidea/form.php

VALPARAISO UNIVERSITY **New Ideas RFP**

Title of Project:

Brief Description:

Why This Should Happen at Valparaiso:

Define Urgency:

Cost Estimate:

Three Outcomes for Proposals



Rejected Outright

Proposals that do not meet the criteria are removed from further consideration



"Banked" for Future Consideration

Proposals are saved for re-evaluation at a later date




Moved to Proposal Stage

Chosen ideas are turned into full proposals that include budgets and implementation plans

A Big Ideas Information Hub

Dedicated Website Clarifies the Process



The screenshot shows a web browser window at <http://devar.ucdavis.edu/resources/big-ideas/>. The page features the UC Davis logo and navigation links: Home, About Us, Career Opportunities, and Resources. The main heading is "Call for Big Ideas".

Annotations:

- Hosted by Development and Alumni Relations:** Points to the "UC DAVIS Development and Alumni Relations" header.
- Endorsed by Chancellor:** Points to the "Message from the Acting Chancellor" link in the left sidebar.
- Contact information for further questions:** Points to the "Development and Alumni Relations" contact details in the left sidebar.
- Open to all members of academic community:** Points to the introductory paragraph of the "Call for Big Ideas" text.
- Big ideas criteria:** Points to the bulleted list of criteria.
- Link to next steps:** Points to the "the next stage" link at the end of the introductory paragraph.

Website Content:

Call for Big Ideas

The University of California, Davis will enter into the silent phase of a comprehensive fundraising campaign in the next 12 months. A critical component of a successful campaign is the generation of "big ideas" that represent audacious, forward-thinking programs and projects that will keep UC Davis at the forefront of academia, and position us for continued success for many years to come. These Big Ideas will come from all levels of the academic community, including faculty, students, staff, department chairs, center directors, the Council of Deans and Vice Chancellors, and university leadership, and should embody the characteristics listed below:

- Transformational (strategic, reputational, leveraging/inspiring, programmatic, financial)
- Single-concept idea (ie. not a collection of smaller naming opportunities)
- Build on strength/foundation at UC Davis but moving toward something more leading-edge
- Interdisciplinary OR having an interdisciplinary impact
- Area where we have the unique capacity to be the best

The university has convened a Campaign Steering Committee that is comprised of Acting Chancellor Hexter, all permanent deans, select university administrators, and the chair of the faculty senate. This committee in partnership with students and staff will review initial submissions for Big Ideas, give feedback, and determine which ideas should [move forward to the next stage](#).

Left Sidebar:

- Call for Big Ideas**
 - Definition of a Big Idea
 - Message from the Acting Chancellor
 - Timeline
 - Big Ideas Next Steps
 - Big Idea Champions
 - Campaign Steering Committee
 - News
- Development and Alumni Relations**
 - University of California, Davis
 - One Shields Avenue
 - Davis, CA 95616-5270
 - phone: (530) 754-8616

IMAGE CREDIT: UNIVERSITY OF CALIFORNIA, DAVIS.

No Form of Communication Left Untouched



Dedicated Website



Memos From Each Dean



On-Demand Presentations



Q&A and Feedback Sessions



E-News Blast

“

The process we executed has **been fantastic for development and has had far-reaching benefits for the entire campus.** Leadership is thrilled with what came of the process, because **it galvanized hundreds of faculty and staff around the idea of stopping, taking a deep breath, and really thinking about what we're good at, where we can go big, and what will define us for the next 20 to 30 years.**”

*Shaun Keister
Vice Chancellor, Development and Alumni Relations
University of California, Davis*

Embedding Transparency in the Decision Process

Creating a Principled Scoring Process



Big Ideas Criteria

- Aligned with the strategic plan
- High degree of distinction related to preeminence in select disciplines
- Required philanthropy to achieve excellence

80 Proposals met criteria and continued to scoring process →

| Big Ideas Scoring System | |
|----------------------------------|----|
| Transformative impact on campus | 10 |
| Meets an immediate need | 8 |
| Increases national acclaim | 6 |
| Creates pan-campus collaboration | 4 |
| ----- | |
| Maximum score possible | 28 |

An Objective and Inclusive Evaluation

Scorecards Indicate Best Idea Proposals

College of Charleston Sample Scorecard

| Proposal | Campaign Bucket | Committee Members | | | | | | Average Score |
|------------------------------------|---------------------------|-------------------|----------------|---------------------|--------------------|----------------|-----------------------|---------------|
| | | Provost | VP Advancement | VP Business Affairs | VP Student Affairs | Chief of Staff | Director of Athletics | |
| Center for Southern Jewish Culture | Power of Place | 14 | 16 | 16 | 14 | 24 | 16 | 16.7 |
| Student Leadership Initiative | Student-Focused Community | 20 | 14 | 18 | 20 | 18 | 24 | 19.0 |
| Center for Livable Communities | Academic Excellence | 9 | 12 | 9 | 8 | 7 | 13 | 9.7 |

Proposals from deans and faculty

30

Priorities sent to President

Scores from committee members

11

Commitments of at least \$1M

Priorities sent to President for approval

\$17M

Revenue from big ideas

Closing the Communication Loop

Follow-Up Process at University of California, Davis



Process Far Exceeds Expectations



40

Proposals expected

196

Proposals submitted

46

Proposals fully met criteria

10

Featured as campaign priorities

\$40M

First gift from big ideas

Show Results and Repeat the Process



Big Ideas Don't End At the Deadline



New Faculty



Dean Turnover



Shifting Research
Projects



UC Davis will repeat the
process **every 3 years.**

Uncovering Funding Priorities In and Out of Campaign

“Big ideas aren't generated at once—they come and go, so you can't just do this and stop. **We'll do this even if we aren't in a campaign, because the process works so well.** Leadership sees ideas they haven't heard about before. They have a better sense of what faculty are passionate about, where the strengths are, or where some faculty have come together for the first time to create these ideas.”

*Shaun Keister
Vice Chancellor,
Development and Alumni Relations
University of California, Davis*

Key Takeaways

- Institutional leadership defines what constitutes a big idea
- Design an RFP to include academic and philanthropic goals
- Widely promote the process
- Select ideas through a transparent, principled process
- Follow-up with all participants to clarify next steps
- Repeat the process regularly


Forthcoming Resources

Ease implementation with:

- Big Ideas Kickoff Session Agenda and Talking Points
- RFP Template and Guiding Questions
- Big Ideas Communication Plan Template
- Idea Selection Guide, Scoresheet Template
- Faculty Follow-Up Timeline and Conversation Guide

A Tool to Get You Started

Discussion/Self-Reflection and Implementation Guide



EAB Advancement Forum

Creating a Consulting Case: High Impact Proposals for the Donor Sector

Translating Insight Into Action

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

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

Creating Coercive Culture

1. Where does our case writing currently exist? What are our weaknesses/move beyond?
2. What is our most immediate concern in terms of writing, and how will we address it?
3. Discuss our current cultural add to the donor's concerns/uptick? 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 to a donor sector?
2. How do we currently gain information about impact from partners on campus? How can we improve this process?
3. In our culture of appointments customized for each donor? How can we ensure that future cultural speakers reach donor's interests?

Investment Framework to 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 identify fundraising priorities
- ▶ Identify strengths and areas for improvement
- ▶ Select aspects of the big ideas process to implement
- ▶ 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.

Contact Information



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