



The Donor Investor Imperative Workshop

Academic / Advancement Collaboration
for Transformational Ideas and Impact

Advancement Advisory Services



Education's Trusted Partner to Help Schools and Students Thrive



Your Imperatives Determine Ours

INSTITUTIONAL STRATEGY

Prepare Your Institution for the Future

Executive guidance rooted in research to support your strategic priorities

MARKETING AND ENROLLMENT

Achieve Your Enrollment and Growth Goals

Tailored partnerships powered by a recruitment ecosystem with unrivaled reach to enroll your future classes

STUDENT SUCCESS

Build a Student-Centric Campus

Technology trusted by 850 schools to retain, graduate, and empower more students

DIVERSITY, EQUITY, AND INCLUSION

Advance DEI on Campus and in Your Community

Technology, research, and bold initiatives to strengthen your DEI strategy and eliminate equity gaps

DATA AND ANALYTICS

Embrace Digital Transformation

Data and analytics solutions built for higher education to guide decisions and accelerate innovation

We partner with **2,500+** institutions to accelerate progress and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.



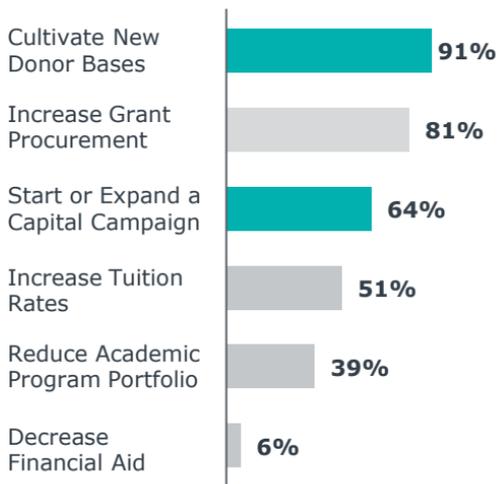
Today's Donor Investor, Big Ideas, and the Idea-Submission Process

Top of Mind for Many

Advancement Making a Post-Vaccine Comeback

Presidents' Hearts Set on Fundraising

% of Presidents Likely to Take Each Action to Manage Budget Shortfall, 2021



A Flood of Campaign Launches

Campaigns Launched Sept.-Oct. 2022



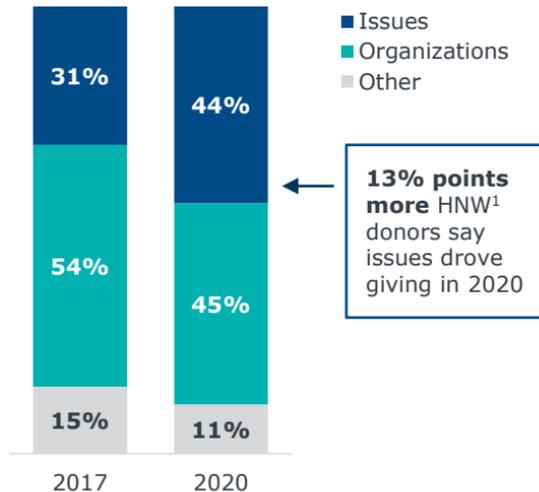
Motivated by Mission, Not Metrics



Donors Don't Give to Meet Campaign Dollar Goals

Top Donors Want Impact

Bank of America Study of Affluent Household Giving, 2021



Current Efforts Fail to Convince Donors of True Impact

55%

Of HNW donors do not know if their giving has intended impact

81%

Of donors are concerned about transparency and understanding gift impact

65%

Of donors would give more if they better understood gift impact

Source: "The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households," Bank of America and Indiana University Lilly Family School of Philanthropy, Sept. 2021; "Overcoming Barriers to Giving," Fidelity Charitable, 2017; EAB interviews and analysis.

1) High net worth

Donors Want to Be a Part of Problem Solving

Engaging With People Doing the Work



Opportunities to Listen and Learn

- Better understanding of the cause or institution
- Knowledge of what is missing from the current landscape
- Stories of impact



Occasions to Lend Personal or Professional Talents

- Move projects forward or increase impact
- Hands-on, individualized engagements
- Value-add for both the donor and the institution



Close Relationships with Institutions or Causes

- Trust in leadership across the institution
- Longstanding interest in a specific cause
- Multiple relationships to maintain stability over time

“Giving without significant, hands-on engagement feels to them like a hollow investment with little assurance of impact”

*Sharna Goldseker and Michael Moody
Editors, “#NextGenDonors: Respecting
Legacy, Revolutionizing Philanthropy”*

“Nothing is more exciting—or more informative—than sitting down face-to-face with the people in charge.”

*Carrie Morgridge
Vice President, Morgridge Family Foundation
Author, Every Gift Matters: How Your
Passion Can Change the World*

Source: Morgridge C, *Every Gift Matters: How Your Passion Can Change the World*, Austin: Greenleaf Book Group, 2015, 85; Johnson Center for Philanthropy, 21/64, “#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy,” 2013, 5, www.nextgendonors.org/wp-nextgendonors/wp-content/uploads/next-gen-donor-reportupdated.pdf; Advancement Forum interviews and analysis.

Extraordinary Resources, Extraordinary Impact



Where Academic Partners are Most Important

Focus on Top of the Giving Pyramid

Principal Gift

/ˈprɪnsəpəl ɡɪft/

noun

1. Giving starting at \$250,000, \$1 million, \$5 million, or even \$10 million.
2. No clear rule—if your organization considers \$1,000 to be a major gift, your organization may define principal gifts starting at the \$100,000 level

"An organization whose major giving level starts at \$100,000 may consider \$5 million to be a principal gift."

Critical Partners With Advancement



Emerging Challenges Impeding Progress



Three Main Pain Points Keep Us from Realizing Principal Gift Success

Strategic Plan Inadequate



- Institutional uniqueness lost in favor of broad thematic areas
- Many priorities merit internal funding
- Statement of priorities too broad for advancement

Lack of Ideas on a Grand Scale



- Immediate needs prioritized over long-term vision
- Research in silos, yet global problems cross disciplines
- Emphasis on scholarly publications over universal impact

A New Breed of Donor



- Donor investors seek long-term sustainable impact
- Expectation of deep relationship with project leaders
- Desire for hands-on engagement and influence

Lost Among the Flock

Institutional Campaign Priorities Are Dull and Repetitive

Generic Strategic Plans

EAB Analysis of Strategic Plans



“

Our president wants to stick with the traditional fundraising priorities. But **alumni are tired of the same old initiatives.** We surveyed our alumni to figure out if our campaign marketing of the priorities had been successful. Not even 40% of our alumni had a clue we were in a campaign.

Vice Chancellor for
Advancement
Private Research University

”

Brokering Compromise Is Hard

Why So Many Higher Education Campaigns Sound the Same



Conflicting Opinions

- Presidential vision
- Departmental needs
- Budget constraints
- Trustee opinions
- Donor interests



Intervening Forces

- Leadership transitions
- New strategic plan
- Political turmoil
- Economic uncertainty
- Student activism



Catchall Campaign Priorities

- Academic excellence
- Student success
- Faculty support
- Capital projects
- Growing the endowment

Campaigns Getting More Similar by the Day

“If you think about a seven-year campaign today, you’re not going to have the same chancellor at the beginning and the end. Whenever you get a new leader, they want to have input on the priorities. **You’re going to see more vanilla goals**, so that anything new can fall into one of the buckets you already have.”

*Associate Vice Chancellor for University Advancement,
Public Research University*



Longing for the Good Old Days

Campaigns of Yesterday



Alumni loyalty brought in donations from many



54%

Of total funds raised was from 27 gifts (*average, 2021*)

➤ **Dependent on top gifts**



Fewer non-profits were competing for donor dollars



75%

Of millennials would give to charity over their alma mater

➤ **Competition for support**



Infrequent use made campaigns stand out as distinct



68%

Of higher education institutions were in campaign in 2020

➤ **Campaign ubiquity**



Institutions had **unique strategic priorities** to support



85%

Of institutions have three of the same strategic plan priorities

➤ **Repetitive priorities**

A Lack of Ideas on a Grand Scale



Advancement Doesn't Have All of the Ideas

“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. Faculty are 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*

Internal Obstacles Impede Progress

Factors Contributing to Inability to Think Big



Academic Culture

- Day-to-day operational needs more urgent than long-term vision
- Few incentives for academic partners to think outside of their department, college, or school
- Scarcity of resources means today's needs take precedence

“Faculty have willingly come along on enrollment because they know that tuition is connected to their success. I wish they understood how their **stability is contingent on our ability to raise funds from alumni.**”

*Vice President, Advancement
Private Baccalaureate Institution*



Advancement-Faculty Disconnect

- Advancement often unaware of interdisciplinary faculty collaboration
- Limited understanding of advancement's role on campus
- Faculty asked to work with fundraisers without prior training or preparation

“I don't like when deans come to me with every idea they have, even though they're not all good for donors. **I feel like the campus ATM**, and the line forms every morning.”

*Vice President, Institutional Advancement
Public Master's Institution*

A New Breed of Donor

With Heightened Expectations for the Organizations They Support

An Emerging Donor on Advancement's Mind

NonProfit
PRO

Strategic Philanthropy: The Shift in Donor Behavior That's Shaking Up the Nonprofit Sector

FT
FINANCIAL
TIMES

Philanthropy: How to Give Away \$1B

THE CENTER FOR
PHILANTHROPY

Treat Donors Like Investors, a Top Philanthropist Urges

“Donors everywhere are much more strategic and thoughtful about their giving. They want to see data and outcomes. They constantly ask ‘Can you show me the numbers?’”

*Heidi McCrory
VP, College Relations – Kenyon College
(now at Furman University)*

The Donor-Investor Seeks



Transformative Impact

Evidence that their gift has led to change that would not otherwise be possible



Compelling Ideas

Innovative, large-scale solutions to local, national, or global problems



Credible Connections

Investment in people who can link big ideas to impact

Donors Seek Transformative Impact

Primary Affinity to Issues, Not Institutions

Donors Are Impact-Centric

62%

Want information on how the organization plans to use the gift

75%

Want information on results achieved with their gift

64%

Want stories about people who were helped

How Next Generation Donors Consider Philanthropic Investments¹

- 1 Setting Goals**
First decide philanthropic goals, then search for potential recipients
- 2 Evaluating Organizations**
Conduct research and due diligence before deciding what to support
- 3 Solving Problems**
Fund efforts that address root causes and attempt systematic solutions
- 4 Analyzing Results**
Prefer information on proven effectiveness or measureable impact

Source: Burk P, "The Burk Donor Survey: Where Philanthropy Is Headed in 2013," Cygnus Applied Research, Inc., Sept. 2013; Johnson J, "Including the Young and the Rich," *New York Times*, Apr. 18, 2014, www.nytimes.com/2014/04/20/fashion/white-househosts-next-generation-young-and-rich.html?_r=2; Johnson Center for Philanthropy, 21/64, "#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy," 2013, www.nextgendonors.org/wp-nextgendonors/wp-content/uploads/next-gen-donor-reportupdated.pdf; Fulfilling the Donor Investor Mandate, Philanthropy Leadership Council, The Advisory Board Company 2014, 11; Advancement Forum interviews and analysis.

1) Survey participants were individuals aged 21 to 40 years-old who were "currently or potentially active in their families' significant philanthropic processes and/or who are wealth creators themselves and currently or potentially active in their own philanthropy."

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 sum to focus on 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 these 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 deadline is 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

Higher Stakes for Higher Education

“Donors are interested in substance. They are trying to achieve something in the world, and they can use universities to do that. What we have to do is convince them that a **university is a good investment for how they want to change the world.** That information is only going to come from the academic leaders.”

*Provost
Canadian Research Institution*

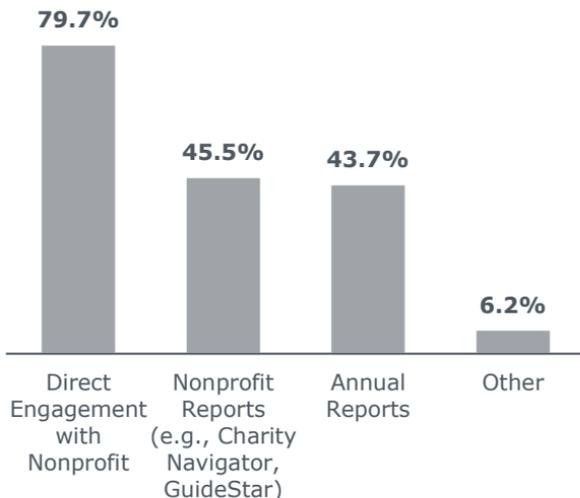
Source: "100&Change," MacArthur Foundation, <https://www.macfound.org/programs/100change/strategy>; "Big Charitable Gifts: Where Donors Have Given \$1 Million or More," *Chronicle of Philanthropy*, https://philanthropy.com/factfile/gifts/1?DonorDisplayName_cu=lang&Category=any&GiftRecipients_RecipOrgDateline_c=&GiftRecipients_RecipStateFull=any&GiftDonors_SourceWealth_cu=&GiftDonors_aStateFull=any&GiftYear=any; "Campaign Nets \$50 Million Gift," University of Oregon, <http://giving.uoregon.edu/s/1540/development/index.aspx?sid=1540&gid=28&pgid=3341&cid=7128&eid=7128&ccid=0&calpgid=2113&calcid=4773>; Advancement Forum interviews and analysis.

Donors Seek Credible Connections

Donors Engage with Leaders to Evaluate the Impact of Their Gifts

Direct Engagement Favored as an Evaluation Tool

How High Net Worth Philanthropists Evaluate Organizations



Donors Invest in People

“Any nonprofit is only as good as the people who run it. **At the end of the day, you’re investing in people...** It’s a lot more informative to have a conversation with whoever is carrying out the group’s mission than to read about them online.

Carrie Morgridge
Vice President, Morgridge Family Foundation
Author, *Every Gift Matters: How Your Passion Can Change the World*

Alumni Invest in Faculty



55%

Of alumni consider relationships with their professors to be a primary source of affinity for their college, university, or school

Source: “The 2014 U.S. Trust Study of High Net Worth Philanthropy,” US Trust, Oct. 2014; Morgridge C, *Every Gift Matters: How Your Passion Can Change the World*, Austin: Greenleaf Book Group, 2015, 38; “Alumni Attitude Study,” Performance Enhancement Group, in Henderson N, “It’s Academic,” Council for Advancement and Support of Education, Jan. 2014, http://www.case.org/Publications_and_Products/2014/January_2014/It%E2%80%99s_Academic.html; Advancement Forum interviews and analysis.

Breaking Free from 'Boring'



'Big Ideas' Fundraising Turns Donors' Sights to the Frontiers of the Possible

The 'Big Ideas' Fundraising Initiative

► *Advancement sources transformative, eight-plus-figure proposals from the academy and engages academic partners in fundraising for them*

- 1** Ask faculty for mega-gift level **funding proposals**
- 2** **Rank, select** the most impactful submissions
- 3** Set those priorities as **campaign pillars**
- 4** Engage academic partners in **cultivation**

What Constitutes a 'Big Idea'?

- ✓ Aligned with the strategic plan
- ✓ Tied to preeminence in select disciplines
- ✓ Transforms campus, community, world
- ✓ Requires philanthropy to achieve excellence
- ✓ Elicits cross-campus collaboration
- ✓ Increases national acclaim

What Only You Can Do

Donor Expectations Require Advancement-Faculty Partnership

Current Challenges



Compelling Ideas

- Scarcity mindset on campus
- Lack of communication between faculty and advancement



Transformative Impact

- Few incentives to share results with Advancement
- Misunderstanding of impact donors want to see



Credible Connections

- Advancement not viewed as trustworthy partner
- Lack of faculty confidence in donor-facing skills



Integral Opportunities for Academic Partners



Sourcing Big Ideas



Communicating the Impact of Big Ideas



Perfecting the Pitch

Bringing Order to Chaos



Developing a Process to Capture Big Ideas

Six Steps to Sustainably Source Big Ideas



What Is a Big Idea?



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

Providing Additional Details to Advancement

Substantiating Your Idea



Ensuring Faculty Provide Necessary Information

Faculty should 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

Other Questions to Support Your Idea Proposal



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?

Step 1 - Initial Evaluation Using Selection Criteria

To be considered, a proposal must be consistent with, and build upon, institutional strengths and values. All such proposals will then be assessed by Executive Council using the following criteria:



- **Distinctive and Innovative** - Does the proposal build upon an institutional strength in a way that is distinctive, innovative, and forward-thinking, and therefore offer enhanced institutional reputation and visibility?
- **Student Learning, Experience, and Impact** - Will the proposal have a significant positive impact on student learning, the student experience, or student opportunities?
- **Societal Impact and Local/Global Engagement** - Does the proposal advance important societal goals (by, for instance, preparing students to tackle social or environmental problems or by enhancing access to students of various backgrounds) and/or does it enhance institutional engagement with the local/regional/ global community or other external partners?
- **Fundability and Market Demand** - Is the proposal financially viable and likely to improve the institution's financial position? Is the proposal likely to garner support and resources from external sources, such as philanthropy, and is it responsive to likely market demand and student need?



Selecting Ideas – a Team Effort

Developing and Refining Proposals

As a result of this initial evaluation, submitters may be asked to consider refinements to their proposals, may be asked to collaborate with other proposal submitters, and may be asked to further develop aspects of their proposal as a result of the initial evaluation.

Institutional resources will be made available as necessary in order to further develop promising proposals.

Step 2 - Refining and Vetting With Key Partners and Stakeholders

Proposals that rise to the top based on the selection criteria will be shared with a select group of presidential advisors, trustees, faculty, staff, and supporters for further vetting and assessment.



Selecting Ideas – a Team Effort

Campus-Wide Participation



Step 3 - Identification of Initial List of Selected Big Ideas

An initial list of selected Big Ideas will be shared with the campus at the beginning of the fall semester 2024. A webpage will be created that includes information about each proposal, as well as an opportunity for members of the campus community to provide feedback.

Step 4 - Campus Engagement

Through campus events and online tools, members of the campus community will be able to learn about potential Big Ideas, provide feedback and assessment, and help strengthen Big Ideas for potential inclusion in the strategic plan and next philanthropic campaign.

Step 5 - Incorporation Into the Strategic Plan and Approval by Board of Trustees

While engaged in the Big Ideas process, we are also drafting a new strategic plan. The elements of the plan will be impacted by the Big Ideas that emerge from this process. These two things—a new strategic plan and a list of approved Big Ideas—must be consistent with and complement each other. We anticipate presenting a new strategic plan to the Board of Trustees in October 2024.

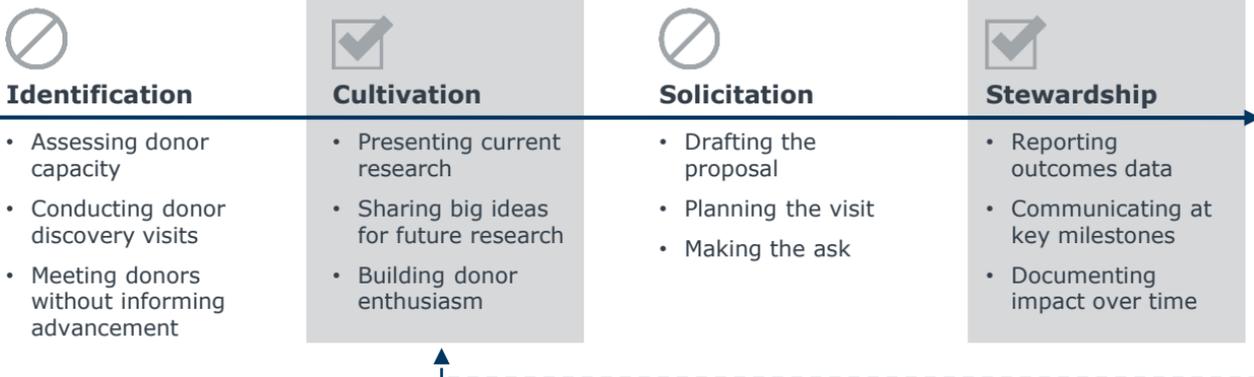


Preparing to Share Ideas, Pitches, and Impact Stories with Potential Donors

Clarifying the Role of Campus Partners

Emphasizing Where You Can Shine

Where Campus Partners Should Be Involved in the Donor Life Cycle



“**Deans don’t need to make the ask.** That is the role of their development officer, and that’s why **it has to be a partnership.** Deans need to speak with passion about an area that is important to them and the donor. Then, when it’s time to make the ask, turn to the fundraiser.”

*Heather Engel
Associate Vice President for Campaigns and Constituent Development
Rochester Institute of Technology*

Faculty Uniquely Positioned to Meet This Need



The Thought Leaders With Whom Donors Want to Interact

Key Skills Already Part of Faculty Responsibilities



Donors Want to Engage With High-Level Thinkers

“Faculty do their research behind-the-scenes, and big-thinking donors like engaging with people like that. Yes, it often results in awkward conversations over cocktails, but they like talking about that kind of stuff. **With faculty, quirky is cool.**”

*Brad Bundy
Senior Associate Vice
President, Advancement
Miami University*

Virtual Communities of Philanthropic VIPs



Olive University¹ Scales High-Value Networking Salons

Get the Right People in the Room...



10-12 Prospects

- Drawn from a single industry or set of industries
- “People to know”



Academic Leader

- Dean, chair, or faculty member
- Expertise in high-interest topic



Major Gift Officer

- Relationship manager for invited prospects

...And Add Compelling Discussion Agendas

- ▶ Inside look at bio-engineering program
- ▶ Real-world research in economics
- ▶ Expert take on current political events



“I don’t think we can blanket say ‘people are tired of Zoom.’ People are not tired of small engaging group discussions. It’s our role to curate that.”

*AVP Strategic Initiatives
Olive University¹*

1) Pseudonym

Putting Faculty Innovation Front and Center

Successful Academic Engagement Focuses on Faculty Skills and Interests

Carnegie Mellon Makes Participation a Light Lift for Faculty



Advancement Asks Fit Easily Into Current Schedule

- Brainstorming display
- Bringing materials to exhibition
- Interacting with visitors
- Explaining research



... And Avoid Worries About Learning New Skills

- Identifying and qualifying prospects
- Compiling gift proposals
- Developing cultivation strategy
- Negotiating gift agreements



Touchscreen displays



Interactive activities



Faculty presentations



Student performances

The Impact Donors Are Looking For



No Standard Definition or Expectation

Donors Accept Many Indicators of Impact

Issue-Specific Impact



Of donors seek information about long-term benefits to society from addressing or resolving issues

Organization-Specific Impact



Of donors seek information about the impact of an organization

Overall issue size and scope



Specific issue subset addressed

All populations affected



Geographic area and population served

Innovative solutions developed



Projects to be funded through philanthropy

Mission-Based Giving Opportunities



From Lycoming College's Vision Statement:

"...cultivate the individual student in service to **careers of significance and lives of meaning.**"

Exciting, Meaningful
New Ideas
to Put in Front of
Donors

An Academic Strategy:

"**Build on existing strengths** in the sciences and utilize enhanced marketing, mentoring, and pathway development to position [us] as an institution that launches students into careers in the health sciences."

A Student Life Strategy:

"Position [outdoor education]...as **a signature institutional program** by expanding and diversifying its offerings while also strengthening marketing of the program to prospective students."

Academic Facilities:

"Construct **a new music center** that provides teaching, practice, and rehearsal spaces and serves as the home of the Department of Music."

Student Life Facilities:

"Construct **a stadium** at the ...Athletic Complex to support the new intercollegiate field hockey program as well as the existing programs in soccer and lacrosse."

Steps & Components Under Larger Themes



'Big Ideas' from UC Davis

'Aging Gracefully with the Use of Assistive Technology' –

UC Davis is looking to partner with donors, corporations, and foundations to accomplish the following:

- Support a world-class center that advances independence for older adults and health knowledge for their providers
- Establish three endowed faculty positions to recruit experts in nursing, medicine, public health, engineering, data science, informatics, and social sciences
- Utilize a simulation home environment for research, clinical training, and caregiver education

'Accelerate Climate Change Solutions for the World' –

UC Davis is looking to partner with donors, corporations, and foundations to accomplish the following:

- Create training programs to support the next generation of climate leaders
- Develop community engagement projects to inform social change
- Fund faculty and staff to produce cutting-edge decarbonization research
- Develop design summits and exchange programs to disseminate ideas and state-of-the-art technology

COMPELLING IDEAS

Today's donors seek specific initiatives that support the issues they find compelling. However, cost pressures are often at odds with the ability of academic leaders to think big—even when we ask them to. Grid advancement officers must place themselves at the center of a process to engage academic partners to generate ideas that will inspire today's donor investors.

Importance of "Supporting a Mission or Cause" Stated by Donor Investors



Ranked #1 out of 24 possible reasons to donate

TRANSFORMATIVE IMPACT

Before making gifts, donors want to understand the impact of their donation. The good news is that for today's donors, "impact" is a flexible term allowing us to pre-wire expectations. To build the case for investment in compelling ideas, the frontline fundraising team needs to understand and communicate their impact. That information, is only going to be uncovered by working with academic partners.

Issue-Specific Impact



of donors seek information about long-term benefits to society that are the result of addressing or resolving issues

Organization-Specific Impact



of donors seek information about the impact of an organization

CREDIBLE CONNECTIONS

Donors want to be part of solving problems. They seek opportunities to listen and to learn about the organizations they support. Many favor direct engagement with those organizations—from leadership to the people doing the work that their gifts support. Advancement leaders and their teams must work with idea originators to build competence and comfort in directly communicating their ideas to donors.

High Net Worth Philanthropists Favor Direct Engagement for Evaluation



CHECKLIST FOR SUCCESS

- ✓ Get the right people in the room
- ✓ Define what is (and is not) a big idea at your institution

- ✓ Create a clear, concise case for investment
- ✓ Pre-wire impact reporting by agreeing on milestones

- ✓ Strengthen academic partners' donor-facing skills with experiential practice sessions
- ✓ Help faculty members develop a compelling pitch

What Donor Investors Want from Higher Ed



Today's major and principal gift donors think differently about their philanthropy and the organizations they choose to support. Acting more like investors, they are interested in substance and are strategic and thoughtful about their giving.

To continue to secure investments, campus leadership and advancement teams must work to convince donors that higher education is a good investment for how they want to change the world.



EAB

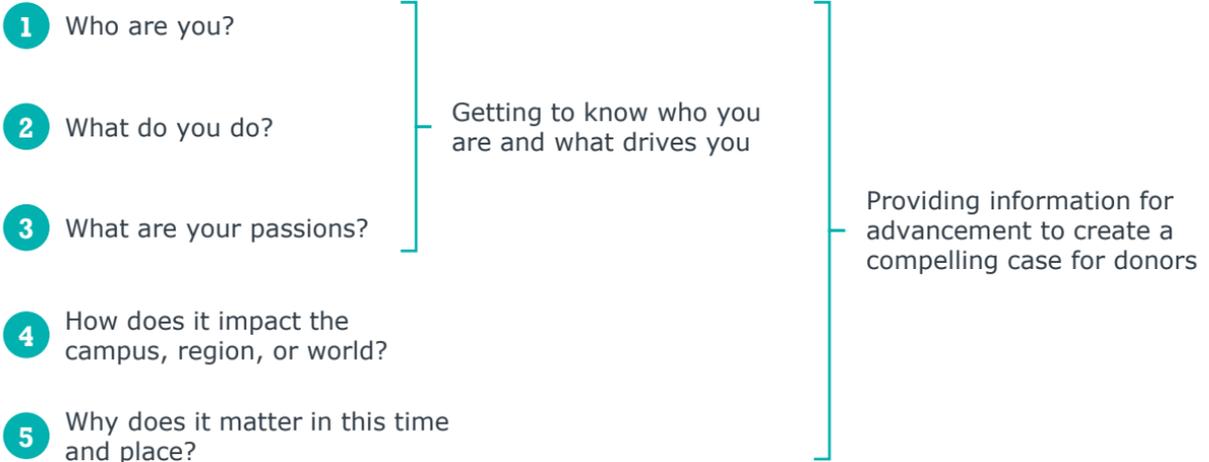
Advancement Forum

Ready to revamp how you approach donor investors? We can help. eab.com/advancementforum

Sharing Details to Show Donors

Conversations Enable Advancement to Prepare Proposals

Key Questions Construct Project Narrative



Being Mindful of Your Time



Lasts 30-45 minutes



Occurs in your office or lab



Conducted by a gift officer or communications staff

Talking Through Your Vision



Boise State Turns Visioning into Time-Limited, Achievable Task

Deans' Task: Answer Four Questions



Advancement Takes It from There

-  **Development Strategy**
Fundraising plans focused on clear priorities
-  **Prospect Identification**
Vision and opportunities linked to potential supporters
-  **Internal and External Collateral**
Consistent messaging for gift proposals and marketing materials

Turning Visions into Gifts

9 White papers created

\$70M Raised to support priorities

Talking Through Your Vision



An Opportunity for Practice and Feedback

Workshopping Your Narrative

Exercise Instructions

Step 1: With a partner, share your working narrative or vision for your school or college.

Step 2: The partner will listen and then prepare feedback for the narrative to be shared during a feedback session.

Step 3: Ask clarifying questions and reframe or adapt your narrative.

Step 4: Switch roles and repeat the process.

The exercise will take 10 minutes for each speaker, including feedback.

Guidelines for Feedback

Feedback Should:

- Focus on improving the narrative
- Target the content of the presentation
- Share donor's knowledge and unique perspective
- Provide direction and cite specific examples

Feedback Should Not:

- Criticize without proposing a solution
- Target oration or presentation skills
- Set unrealistic expectations
- Be too general to be helpful

Fleshing Out Your Proposal Ideas



1. Project Leadership

Please list the faculty and/or staff members involved in creating this proposal.

2. Big Idea

Please describe this project as best you can at this time, addressing as many of the following elements as possible.

- Project title
- Project description and key elements (250 words or less)
- How does this project take advantage of current institutional strengths as shown in our Draft Strategic Themes?
- Does (or could) this project involve more than one school or college within Lewis & Clark and/or does it involve multiple academic departments?
- In what areas will this make Lewis & Clark a leader—or transform our existing leadership? And how will this help differentiate us from our peers?
- How will this project strengthen student outcomes and experiences?
- How will this project help us meet enrollment and retention goals?

3. Impact

- Why do we need this project at Lewis & Clark?
- How will this project impact our campus community?
- How will this project impact the local community or region?
- How will this project help solve thorny societal or global issues?
- Why does the world need this project now? What's the urgency?



4. Implementation and Sustainability

- How long will it take for you to make a visible impact on Lewis & Clark? And locally or globally?
- How will this project be sustainable for the next three to five years?
- Will this project continue beyond three to five years? What additional impact will it have?

5. Resources/Philanthropy

- What funding—internal and external—if any, have you already received toward this project (or one closely related)?
- How does this project leverage existing resources on campus?
- What additional resources do you need to fulfill the project you describe? If possible, please include cost estimates.
- Do you have any donors in mind for this project?
- If you receive philanthropic funding, how would you communicate progress over time to the donor(s)?



“Whoever Tells the Best Story Wins”

Elements of a Winning Story



Authentic voice, including imperfections



Provides a sense of time and place



Adds meaning to data

Where Faculty Go Wrong

“The purposes of this **planning process** are to improve upon and leverage existing **engagement programs**, to identify opportunities for additional engagement on campus and to develop a long-term plan for **supporting and sustaining such efforts**. This project would leverage the knowledge and skills of faculty and staff currently **implementing engagement programs** to **work with campus leaders** on a campus-wide engagement plan.”

Lacks specific details, unique features, and meaning for non-academic audiences



Helping Numbers and Narratives Work Together

“In the past two decades, cognitive science has increasingly come to support the claim that we, as a species, think best when we allow numbers and narratives, abstract information and experiential discourse, to interact, to work together.”

Scott Slovic, Ph.D. and Paul Slovic, Ph.D.

Editors, Numbers and Nerves: Information, Emotion, and Meaning in a World of Data



Creating a Donor-Friendly Narrative

1. Would someone with little or no expertise in this field understand the project? Does the faculty member use too much jargon?
 - What does that mean in lay terms, so that potential donors will understand your message?
 - How would you explain that idea to a family member or a neighbor?
2. Does the story effectively communicate how the project will impact campus, the region, or the world?
 - You are conducting this project here and now. How can we tell donors why this needs to happen in this place at this time?
 - How can we connect this project to the larger global issues that it impacts?
3. Does the project description balance visionary thinking with transparency into potential shortcomings of the project?
 - Major donors are visionary thinkers who want to think about what's possible, but they are also realists. We should focus on the ideal end-state of this project to inspire donors, while also providing insight into major predicted challenges.
4. Are the project plans and funding opportunities presented as a compelling narrative or a "laundry list" of needs?
 - Our donors want to create meaningful, lasting change with their philanthropy. While I understand that there are immediate funding needs for this priority, we should focus on raising donors' sights to the overall vision and impact of the project.
 - Describe the connections between these listed funding needs. How do they each contribute to the overall vision and impact of the project?

**Mission and Purpose**

What problem are you trying to solve?

How is your organization uniquely qualified to tackle this project?

What project are you promoting? What details do I need to know to understand it?

What other departments or organizations are involved?

Goals

What action will you take first?

How will you measure success?

What roadblocks might you encounter? How will you manage them?

Fundraising Plan

How much overall funding do you need?

How will my gift shape the project's outcome?

What other funding have you secured?

Impact

What will be the benefits of this project?

Why is this a pressing need?

What do you predict will happen, thanks to this project, in the next five years?

Additional Questions

Translating for the Donor Investor

Consider Your Audience when Describing Your Work

Original “Program Overview”

“The program will successfully link concerns over access, diversity, and equity in the United States with a **hemispheric model** of internationalization. We will champion **new paradigms** to offer responses to this challenge that understand U.S. socio-economic and political processes within larger global and hemispheric contexts. This proposal includes **new classes and research agendas, multi-lingual classrooms, a strategic cluster hire, and an endowed chair.**”

Revised “Value Statement”

“We will **take the lead** in studying the **impact** of internationalization and respond to the **challenges** it presents on a local, regional, and global scale. We will answer questions about access, diversity, and equity through innovative teaching and research, fostering **collaboration among experts** and building a dialogue that is **unique to our institution.**”

Key Language Elements

-  Minimize academic jargon
-  Clearly focus on short-term outcomes and long-term impact
-  Highlight how you are uniquely positioned to have an impact

Linking Academic Work to Societal Issues

Start Thinking Outside-of-the-Lab

Appreciating Innovation Anywhere

“Anybody with significant means anywhere in the country will have a **national, if not a global mindset** of how they think the world is moving, and what the innovations are. **They will appreciate innovation anywhere** and investments for their own communities or the world to continue to thrive.”

*Amir Pasic, Ph.D.
Dean, Lilly Family School of Philanthropy
Indiana University-Purdue University
Indianapolis*

From Your Lab to the Global Stage



Individual and Team Research

Behavior, senescence, parasitology, predation, and conservation of Malagasy lemurs



Local Area Affected

Ranomafana National Park, Madagascar



Societal Issue Set

Climate change, public health, conservation



Impact to Scale

Local, regional, and global spheres of impact over time

Helping You “Talk Like TED”

“Ideas Are the Currency of the 21st Century”



Be Emotional

You can't inspire others without being inspired

An enthusiastic, meaningful connection to the topic is transmitted to the audience

Tell stories that engage hearts and minds

Stories help the speaker connect with listeners and make a new idea more convincing

Have a conversation

Practice so that delivering the presentation is as comfortable as speaking with a friend



Be Novel

Teach the listener something new

Include unexpected elements or give the audience a new way of looking at the world

Deliver a jaw-dropping moment

Elicit a strong emotional response to grab the listener's attention and make the presentation memorable

Lighten-up

Don't take yourself or your topic too seriously



Be Memorable

Set a Time Limit

Keep the presentation short for successful transmission of ideas

Paint a mental picture

Allow the audience to envisage concepts that are foreign, complex, or otherwise hard-to-understand

Stay genuine

Openness, authenticity, and vulnerability are strengths to be cultivated, not weaknesses to erase

Communicating in Donor Investor Terms



Value Category	Sample Terms and Phrases for Donor Investors
Innovation	Academic and translational research leader, innovation incubator, technology pioneer, entrepreneurship center
Competitive Advantage	Attract and retain top talent, improve access to higher education, become the leader in the field, maintain a tradition of excellence
Research Outcomes	Solve global problems, answer societal questions, translate data into impact
Impact	Improvement over time, catalyst for change, local community, regional development, global shift
Financial Performance	Sustainable initiatives, efficient management, seed funding, institutional investments
Recognition	National rankings, faculty awards, public reputation, competitive research grants and fellowships
Progress	Time to reach goal, key milestones, new or additional investment, seed funding
Community Value	Impact on the local community, reach underserved populations, student engagement

Communicating in Donor Investor Terms

Clarifying Volunteer Roles During the Session

Feedback Session Process

1

Establish Ground Rules

Clarify what constitutes positive feedback to maximize benefits to all participants

2

Time for Reflection

Allow participants to consider the presentation before soliciting feedback

3

Feedback Discussion

Questions include:

- Does this resonate with you?
- What's missing?
- What other information do you need?
- What would make this more compelling to a donor?

Guidelines for Feedback

Feedback Should:

- Focus on improving the narrative
- Target the content of the presentation
- Share donor's knowledge and unique perspective
- Provide direction and cite specific examples

Feedback Should Not:

- Criticize without proposing a solution
- Target oration or presentation skills
- Set unrealistic expectations
- Be too general to be helpful

Preparing for Donors' Questions

Providing Answers for Predictable Questions



Proposal Elements Anticipate Donor Questions



Mission and Purpose

- What problem are you trying to solve?
- How is your unit uniquely qualified to tackle this problem?

Goals

- What action will you take?
- How will you measure success?



Fundraising Plan

- What will the gift fund?
- How will the donor's gift shape the outcome?

Impact

- What will be the benefits of your action?
- Why is this now a pressing need?



A good “big idea” has multiple layers of appeal for different constituents and can be framed differently based on the stakeholder. It also lends itself to effective impact communication through both stories and statistics.

Select a current or potential project or fundraising priority and describe how you would frame and communicate it through the lens of a group that cares most about impact on...

- ***the institution*** (current students, future students, alumni, faculty, staff, and overall institutional brand);
- ***the region*** (community, state, employers, workforce, and other local stakeholders or constituencies);
- ***society or the world*** (people, places, or populations affected by a certain societal issue or cause).

How will you demonstrate the impact of your project to current donors and future supporters?

- Live experiences or demonstrations;
- Stories or testimonials;
- Statistics or evaluation?

Why is your institution uniquely deserving of this gift and capable of (or the “best investment” for) solving this particular problem?

Strengthening Content to Appeal to Donors

Strengthening Your Narrative

Exercise Instructions

Step 1: With the same partner, evaluate whether your project pitch responds to the questions that donors will ask.

- Which questions do you already answer?
- What information should be added?

Step 2: The partner will listen and provide advice regarding information that should be added or removed.

Step 3: Switch roles and repeat the process.

The exercise will take five minutes for each speaker.

Donor Questions to Consider

Narrative Should Include References to:

- Unit or division mission and purpose
- Project goals
- Plan to sustain funding over time
- Project impact on a local or global scale

Preparing One Visit at a Time

Assuaging Faculty Concerns Before the Visit

“If we hire a secretary, that person will have to go through dozens of university trainings for their job responsibilities. **I have never been trained for 95% of what I do, especially the 30-40% that is fundraising.**”

*David Perlmutter, Ph.D.
Dean, College of Media and Communication
Texas Tech University*

“I am best used by getting me in front of the **right people** with the **right preparation**, the **right understanding of why we are meeting**, and **what we hope to accomplish**. For recent big gifts in the \$10M range, it was all about the relationship and not at all about a transaction.”

*Larry Pulley, Ph.D.
Dean, Raymond A. Mason School of Business
College of William & Mary*

Clarifying Roles, Goals, and Messages

Before meeting with a donor, brief academic partners 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



Visioning, Specializing, and Re-Branding?

NORTHERN LIGHT

Our Northern location and rugged nature have made us survivors. Life at the top of the world requires practical thinking, openness and the ability to work together.

Today, our 11 faculties and 4,300 researchers carry out boundary-breaking multidisciplinary research and educate 40,000 students.

We are one of the best. We rank within the top 1% of the world's research universities.

WITH THE POWER OF THOUGHT CREATING THE FUTURE OF LEARNING

Finland is the world leader in education. Every child has the same opportunity to excel. We train the best teachers, with the highest standards. Our training is based on rigorous scientific research.

As digitalisation democratises learning, teaching will be ever more collaborative, student-centred and open to all. The latest teaching methods will focus on students experiencing things for themselves, breaking down boundaries.

Work across
new teaching

SECURING OUR PLANET'S FUTURE

To secure our planet's future, we need new ideas to combat climate change. We need fresh evidence of what is happening in the atmosphere, on the ground and throughout our ecosystem.

The University of Helsinki is a pioneer of climate research, and one of the world's leading research institutions in the field.

Institutions Differentiating Themselves

Advancement Begins to Help

Institution	Location	Industry	Differentiator
George Mason University	DC Metro Area	Technology	Cybersecurity
Occidental College	LA Metro Area	Entertainment	Music and Media
Colorado State University	Fort Collins, CO	Sustainability	Climate Research

Advancement's Process at Oxy to Jumpstart Differentiation

1

Alums and parents join a **differentiation task force** to brainstorm ideas and funding needs

2

President approves suggested funding initiatives and **fundraising begins**

3

Relevant differentiator topics from task force are **included in strategic plan**

On the Other Side of Seven Figures



Institutions of All Types Find Principal-Gift Success with Big Ideas

Transformational 'Big Idea' Gifts

Caltech

\$750M to Caltech to discover breakthrough solutions to climate change



\$550M to Western Michigan University to improve access for underrepresented students



\$100M to Northeastern University to turn southern Maine into a tech hub

UCI

\$58M to UC-Irvine for pioneering, multidisciplinary research into depression



\$34M to Morehouse College to eliminate Class of 2019 students' debt



\$24M to the University of Montana to advance water conservation research

The Advancement Advisory Services Team



Liz Rothenberg, Ph.D.
Managing Director



Maria Vance
Senior Director



**Fleming Puckett,
Ph.D**
Senior Director

Fpuckett@eab.com



Jenna Dell, Ed.D.
Director



Josh Ddamulira
Associate Director



Eddie Issertell
Senior Analyst



Brigid Crowley
Research Analyst



The Donor Investor Imperative Workshop

Academic / Advancement Collaboration
for Transformational Ideas and Impact

Advancement Advisory Services