

**BRAKELEY**

FUNDRAISING & MANAGEMENT CONSULTANTS



# Leadership and Leadership's Role in Fundraising

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**Raising the Stakes in Fundraising**

# Fundraising Leadership Triangle

CEO

Chief Volunteer



Chief Development Officer

# Quotes from a recent interview

**“Camaraderie that goes with big fundraising”**

**“Process of bringing light into darkness”**

**“Deans have not gone out to fight for what they believe in.  
Their humility has not been adequate”**

**“The nice experience of seduction” (when being asked for  
money by Harvard Business School)**

# **“Harvard Rules”**

- **Donors need to be made to feel they contribute more than money**
- **Systematic, strategic, high-quality relationship building**
- **Gift objectives should be tied to strategic objectives of the institution**
- **Culture of engagement with alumni, parents, natural stakeholders**
- **Financial transparency**
- **Professionally run development office**

# Transformational Giving

## Creating a “culture of engagement”

- **Raising sights** – vision that motivates gifts that will transform your institution
- **Involvement** – bring external decision makers, opinion leaders, and donor prospects into the planning process at the earliest possible time
- **Partnership** – engage and communicate with as many people as possible in a meaningful way
- **Stewardship** – involve donors meaningfully and appropriately in the life of the institution and specifically projects they have funded

# Issues between volunteers and professional management

- Partnership between the CEO and the Chair
- Culture and climate of the Board – “why am I on this board?”
- Composition of the Board and how members are chosen
- Degree of common purpose and how well members understand their role and responsibilities

# What is the role of a Trustee

To contribute to and approve medium and long term strategic objectives for the University

- To monitor the implementation of policy
- To appoint the CEO
- To ensure the financial solvency of the institution
  - approving budgets, monitoring financial performance and protecting assets
- To act as ambassadors and advocates
- To provide leadership, support and encouragement

# Definitions

## – Volunteer Leadership Groups

- Trustees
- Boards
- Boards of Governors
- Visiting Committees
- Development Boards
- Advisory Boards
- Working Groups
- Alumni Boards
- Overseers
- Auxiliaries

# A successful Board

- Shares a common purpose and enthusiasm for the work of the organisation
- Works as an effective team
- Provides a pool of expertise
- Monitors the financial situation
- Takes ownership of fundraising needs and objectives
- Acts as a responsible employer of staff
- Must be committed – members make your institution their primary volunteer commitment

# A successful Board

*Does not:*

- Engage in the day-to-day operations and management of the organisation
- Recruit staff other than the CEO
- Get involved in details

# Energising the Board

- Create an action culture
- Recruit committed “doers”
- Make expectations clear
- Equip board with information
- Create reporting structure
- Use expertise of Board
- Feedback and praise
- Maintain good staff communication
- Evaluation

**Make being on the board FUN and  
INTERESTING**

# Trustees' and Volunteers' Role in Fundraising

# The Ideal Volunteer Partner

- Knowledgeable about the institution and your specific fundraising agenda
- An articulate spokesperson (for the case, for the organisation)
- Patient, collaborative, and strategic; makes a serious commitment to the cultivation of donors
- A colleague, an ally, and a partner in a long-term process, not just a short-term “ask”
- A leadership donor who can provide access and advocacy

# The Strategic Process of Major Gift Solicitation

- Identify the prospect
- Research and evaluate
- Develop an approach plan
- Engage and cultivate
- Ask for a gift
- Negotiate and close
- Acknowledge and steward the donor

# The etiquette of a good solicitation

- You know your donor prospect well
- The donor prospect has been fully engaged in developing the institution
- He/She knows what you will be asking for and why and the solicitation takes place in person on the donor's turf
- The solicitor has already made a significant contribution (if done by a volunteer)
- The institution (and solicitor) makes no assumption that a gift is owed to them



**In arboribus non crescit.**

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