

# *Current Fundraising Challenges at Higher Education Institutions in SA*

National Workshop  
5 May 2017, Stellenbosch

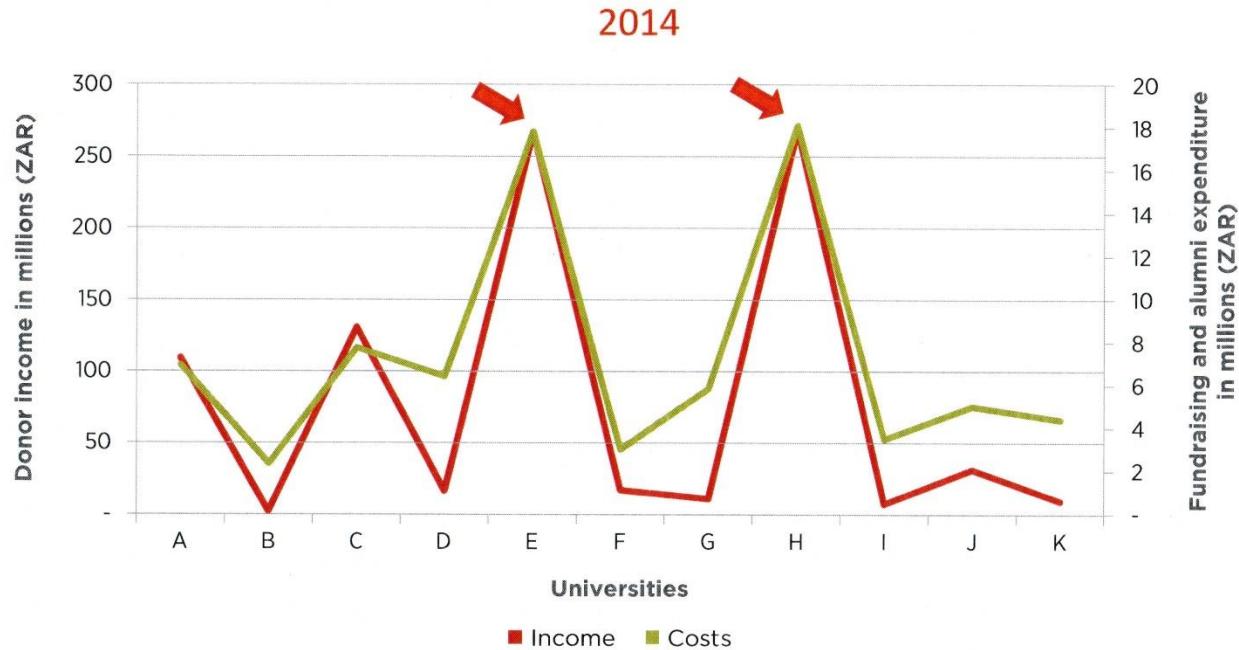
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# Questions

- Shortage of skills?
- Influence of the crisis in the Higher Education sector on fundraising
- Effective database management

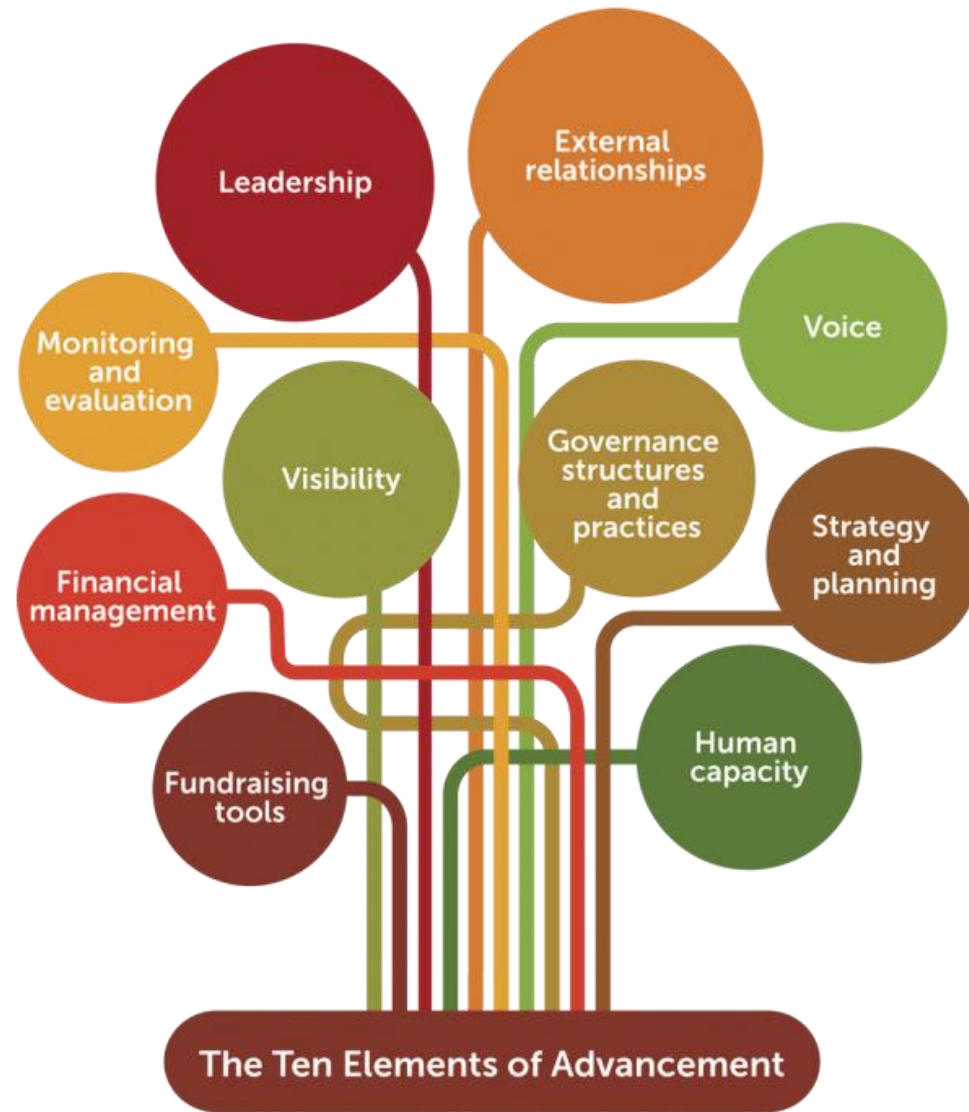
# Expenditure on fundraising and alumni relations correlated with donor income



# Advancement

A systematic, integrated method of (and approach to) building and managing relationships and engaging with the external environment, towards increasing an institution's support from its key outside constituents, including alumni, government policy makers, the media, members of the community, and philanthropic entities of all types.

Inyathelo (SA Institute for Advancement) definition



# Whose skills?

- Vice-Chancellor
- Other members of management team
- Deans
- Project leaders
- Institutional Advancement staff
- Fundraisers
- Alumni officers
- Database manager
- Prospect research
- Proposal writing

# What skills?

- Strategic thinking
- Marketing
- Communications
- Fundraising
- Prospect research
- Project planning/management
- Proposal writing
- Stewardship
- Governance
- Ethics
- Database -> CRM

# Abilities and skills

- Leadership
- Influence
- Strategic Thinking
- Communication
- Performance management
- Managing talent
- Working across the organisation
- Relationship management/ winning new business
- Innovation

Competencies from the Institute of Fundraising UK



# Innovation

- Uses creativity to challenge the norm and generate development
- Takes an inquisitive approach to the world around them and challenges the status quo
- Is creative in spotting new income generation opportunities
- Works with others to create new ideas and challenges others to see things differently
- Turns ideas with potential into reality
- Takes considered risk when the reward justifies it

# Inside the Mind of a CURIOUS CHAMELEON

Finding the Elusive High Performing Major Gift Officer in Today's Competitive Job Market

The thirst to learn more about people, places, and things

## INTELLECTUAL AND SOCIAL CURIOSITY

- Accesses a deep and wide repository of knowledge to inform donor discussions
- Identifies the link between seemingly disparate ideas
- Probes prospects by asking thoughtful, insight-generating questions about their goals and interests

Transparency and honesty when asking donors for financial support

## STRATEGIC SOLICITATION

- Transparency with prospects about the purpose of cultivation visits
- Recognizes that the fastest way to qualify a prospect is to meet with them in person
- Does not take solicitation rejection personally

## BEHAVIORAL AND LINGUISTIC FLEXIBILITY

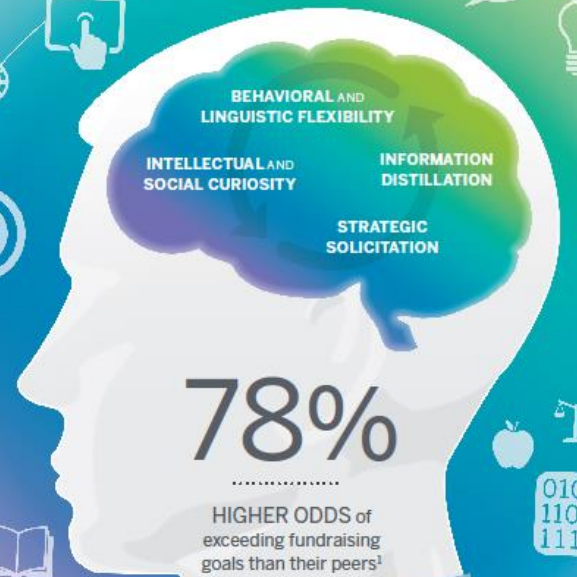
The skill to change speaking style and behavior depending on the audience

- Changes tone, inflection, and vocabulary based on the background and experiences of a prospect
- Reads nonverbal cues, including body language, and adapts approach accordingly
- Utilizes prior experience working with diverse audiences in order to take calculated risks

## INFORMATION DISTILLATION

The ability to recognize, curate, and communicate relevant information

- Possesses a fluency with data and analytics to enhance prospect prioritization
- Quickly zeroes in on relevant details related to donor motivations and interests
- Explains complicated issues in a comprehensible fashion



78%

HIGHER ODDS of exceeding fundraising goals than their peers<sup>1</sup>

### How to Hire CURIOUS CHAMELEONS

- 1 Expand the recruitment pipeline to include nontraditional candidates from fields like sales, marketing, and finance
- 2 Implement a multimodal interview process, including exercises like prospect profile reviews, writing activities, and donor role plays
- 3 Deploy online assessment tools to determine alignment between your ideal MGO profile and the profiles of job candidates

<sup>1</sup>Based on 1,217 major gift officers at 89 higher education institutions in North America and the United Kingdom.



# Curious Chameleons

“These individuals possess behavioural and linguistic flexibility, intellectual and social curiosity, the skill to distil information, and the ability to approach the solicitation process in a strategic manner. Curious Chameleons represented just 3.8% of the survey population, but had **78% higher odds of exceeding goal.**”

Education Advisory Board (USA)

<https://www.eab.com/research-and-insights/advancement-forum/infographics/inside-the-mind-of-a-curious-chameleon>

# Where to develop skills?

- On the job
- Case [www.case.org](http://www.case.org)
  - Conferences (esp Africa and Europe)
  - On line Resources
  - Case on campus model?
- Inyathelo [www.inyathelo.org.za](http://www.inyathelo.org.za)
- Coaching
- Mace conferences?

# Challenges

- Crowded landscape
- Managing data; keeping up with technology
- Improving efficiency
- Generational & other differences
- High speed world – don't keep donors waiting!
- Retain existing donors
- Tell the stories

# What can Mace members do?

- Realise: you are part of the fundraising team
- Put together a 101 course?
- Ref to online resources
- Webinars
- On campus “clinics”
- Coach each other?
- Benchmark