Many Hats

The Many Hats of a Major Gifts Development Officer
Introduction
Why fundraising?

"For small creatures such as we the vastness is bearable only through love."
-Carl Sagan
The Big Gift
The Big Gift

- 2 year, 8 month solicitation period
- $1M+ Ask
- Family Foundation
- Funding criteria evolved to be highly specific
- 1st proposal was capital oriented, more generic.
- 2nd proposal was research oriented, highly customized.

= Lots of emails!
The Big Gift: How did I spend my time?

Emails: Sent vs. Received
(2 years, 8 months)

Sent
32.4%
374

Received
67.6%
780
The Big Gift: How did I spend my time?

Sent Emails: Emails to Donor vs. Emails to Colleagues
(2 years, 8 months)

Donor
9.6%

36

Colleagues
90.4%

338
The Big Gift: How did I spend my time?

Emails to Colleagues by Category
(2 years 8 months)

- Strategy/Research: 9.2%
- Donor Calls: 26.6%
- Gift Agreement: 9.5%
- Old Proposal: 8.3%
- New Proposal: 34.3%
- Recognition: 5.3%
- Other: 6.8%
The Big Gift: Implications

- Big gifts in large institutions are often like this.
- Should fundraisers be spending a lot of time on this? (Probably not!)

We need two things:

- A standardized, strategic approach for setting philanthropic priorities in big institutions.
- Better skill development for fundraisers to manage proposal development.
Project Management for Winning Proposals
“A temporary organization that is needed to produce a unique and predefined outcome or result at a pre-specified time using predetermined resources.”

-PRINCE2 Manual
Proposal Development is a Project!

Temporary Organization: The programmatic experts you need to develop a project.

Predefined Outcome: A proposal.

Prespecified Time: When the donor wants the proposal.

Predefined Resources: Writer/Designer.
Insights from Project Management: Team Building
Insights from Project Management: Reward Power

Formal: This power is based on the position of the development officer.

Penalty (Coercive): This power comes from the ability to penalize team members.

Expert: This power comes from being the technical expert or even the project management expert.

Referent: Referent is the power of charisma and fame. This power comes from another person liking the project manager, respecting him, or wanting to be like him.

Reward: This power stems from giving rewards.

(Project Management Institute)
Insights from Project Management: Stakeholder Management
Negotiations in Proposal Development
Insights from Negotiations Theory: ZOPA

What we need money for: Things that are difficult to “sell”

What Donors want to fund:
- What we need to find (aligned with priorities, of interest to donors)
- Projects that might be a bit tangential to immediate priorities

Zone of Possible Agreement (ZOPA)
Insights from Negotiations Theory: Why is Zopa important?

- Will I have enough $ to pay my staff? Can I pay myself?
- Does our gift include enough overhead?
- How detailed is the reporting which your donor is expecting?
- Will this project be aligned with our strategy?
In summary:

What we need money for

It is easy to get this wrong
Proposal Development: Tips for Success
Proposal Development: Tips for Success

Don’t get caught up in your own hype machine!
Proposal Development: Tips for Success

(Understand your institutional context)

CAMH Foundation vs CAMH Revenue
FY 17/18, 000's of Dollars

- CAMH Foundation: 12.0%
  - $418,950
- CAMH: 88.0%

SickKids vs. SKF Revenue
FY17/18, 000's of Dollars

- SickKids Foundation: 10.0%
  - $106,328
- SickKids: 90.0%
- SKF: 10.0%
  - $961,900
Proposal Development: Tips for Success
(Understand your institutional context)

York University Donations vs. Other Revenue
Year Ended April 30, 2018. 000's of dollars.

- Donations: 1.4%
- Other Revenue: 98.6%

$1,078,000
Proposal Development: Tips for Success

Don’t Over-Promise
Proposal Development: Tips for Success

Be Collaborative
Proposal Development: Tips for Success

Don’t be afraid to ask questions!
Proposal Development: Tips for Success

Always leave a paper trail.
Questions and Answers

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