

---

---

# 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

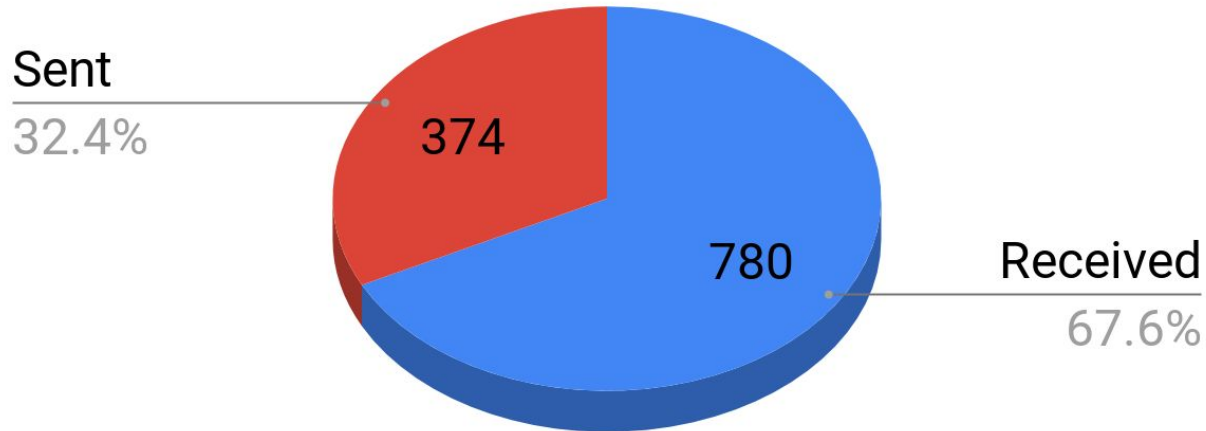
# The Big Gift

- 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!

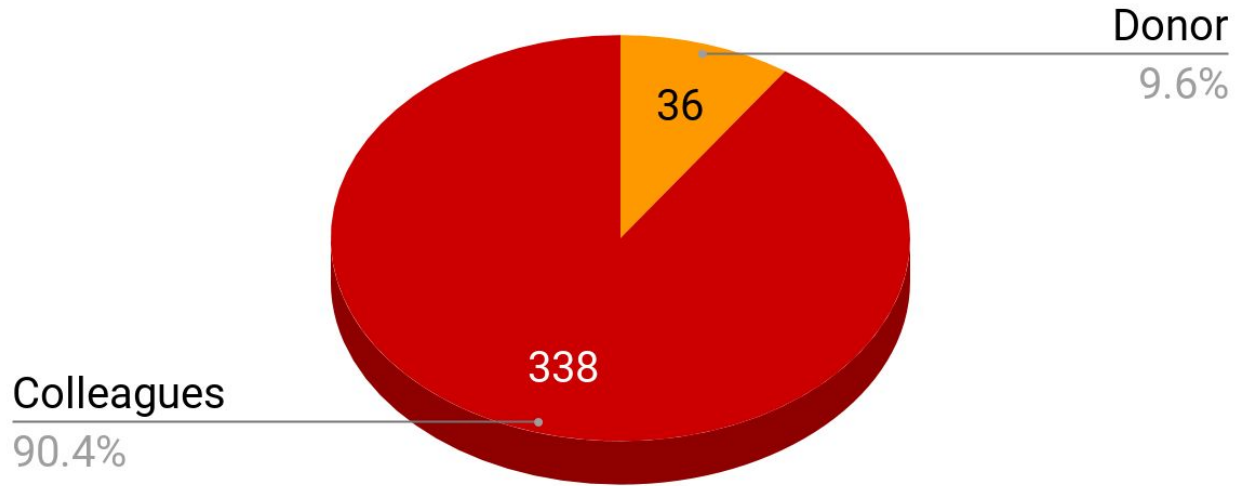
# The Big Gift: How did I spend my time?

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



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

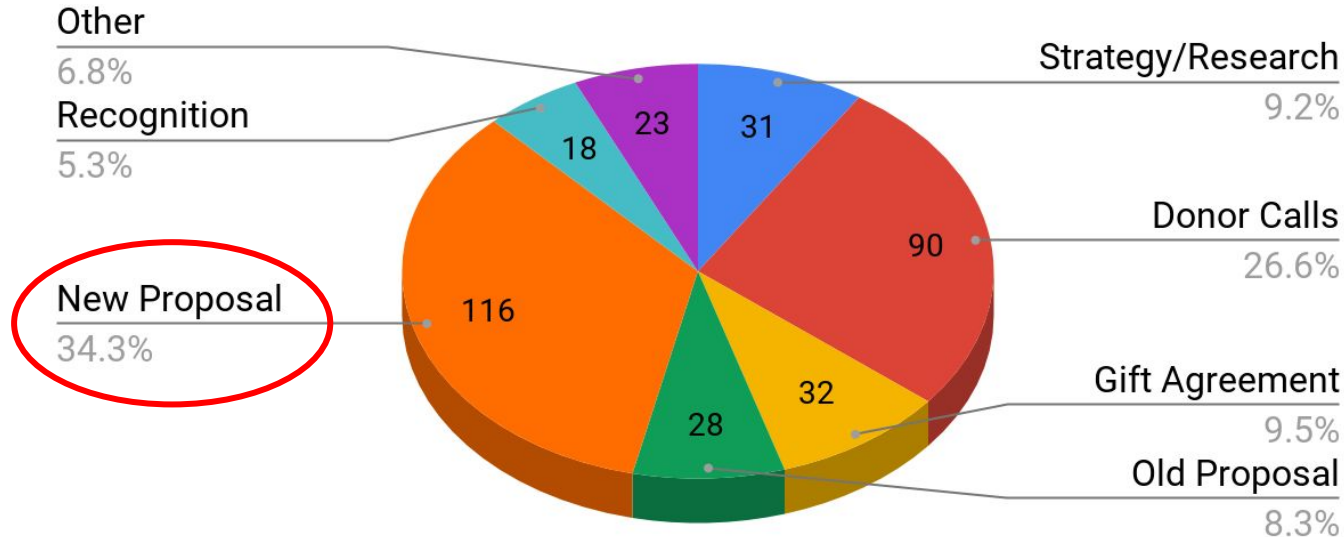
Sent Emails: Emails to Donor vs. Emails to Colleagues  
(2 years, 8 months)



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

## Emails to Colleagues by Category

(2 years 8 months)





# 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.

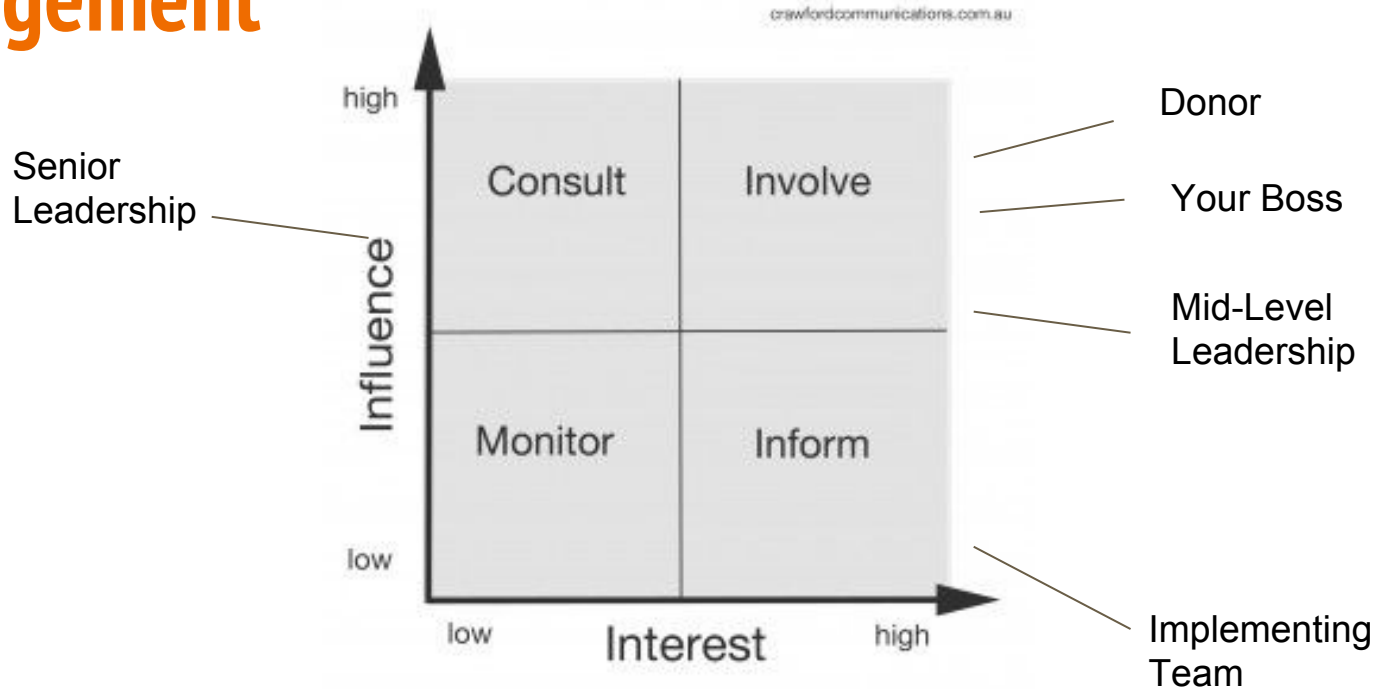
Expert: This power comes from being the technical expert or even the project management expert.

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)*

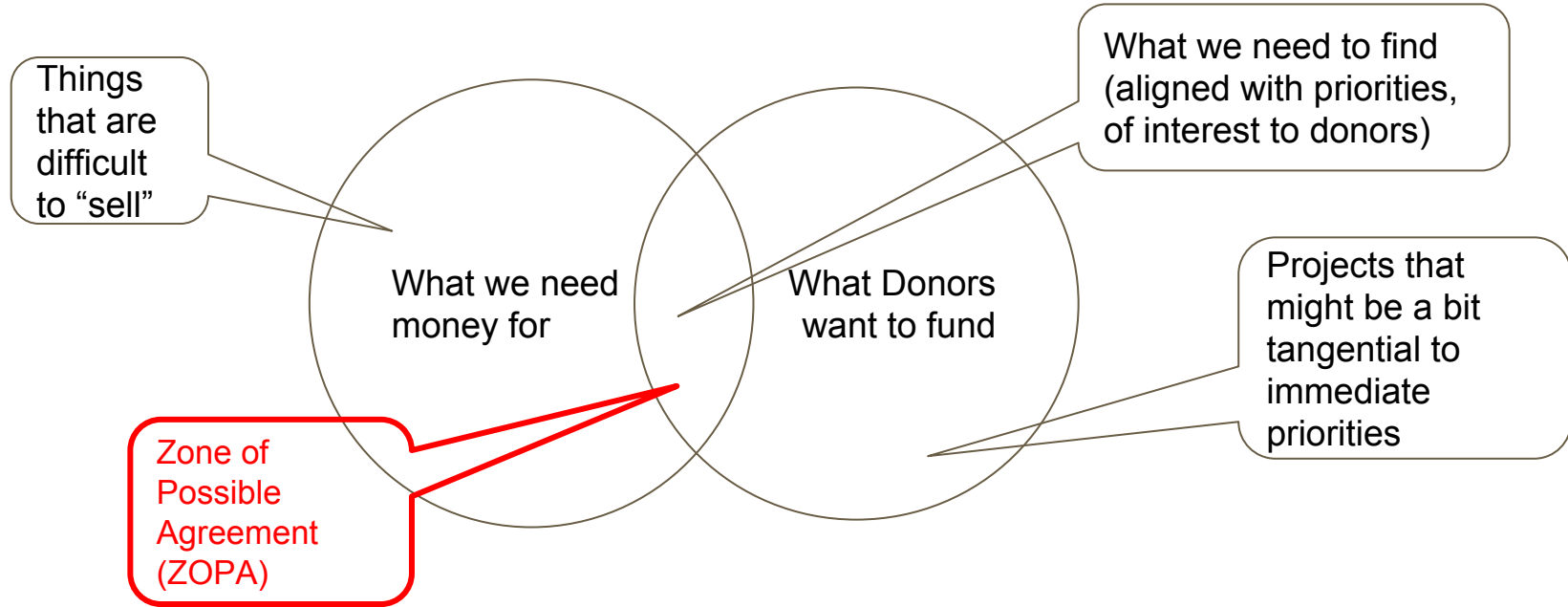
# Insights from Project Management: Stakeholder Management



# Negotiations in Proposal Development



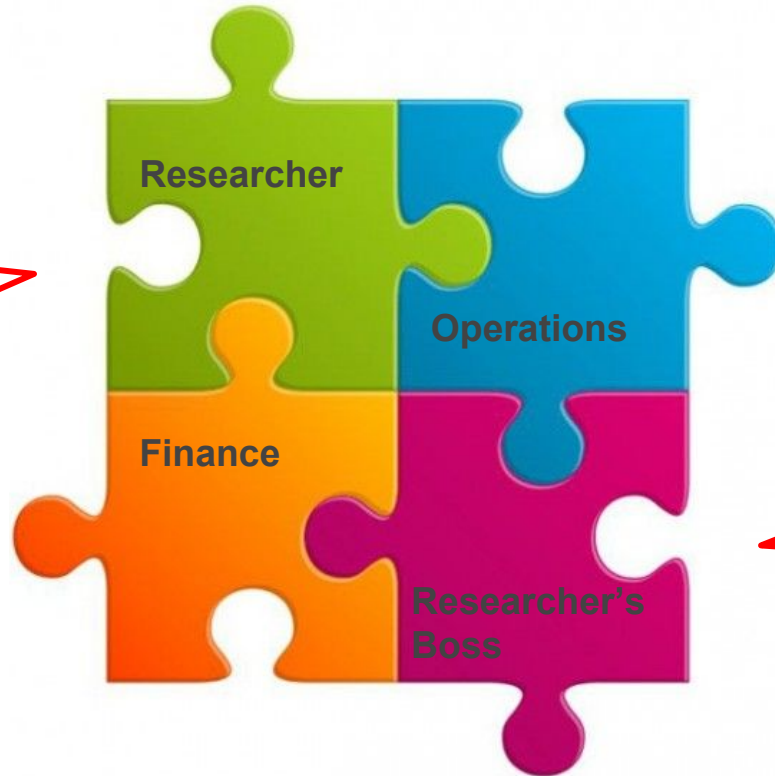
# Insights from Negotiations Theory: ZOPA



# Insights from Negotiations Theory: Why is Zopa important?

Will I have enough  
\$ to pay my staff?  
Can I pay myself?

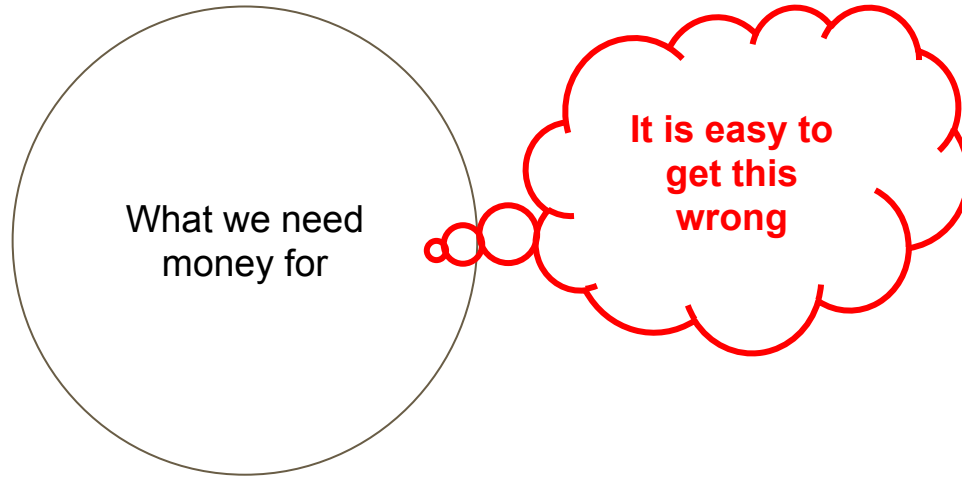
Does our gift  
include enough  
overhead?



How detailed is the  
reporting which  
your donor is  
expecting?

Will this project  
be aligned with  
our strategy?

# In summary:



# 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

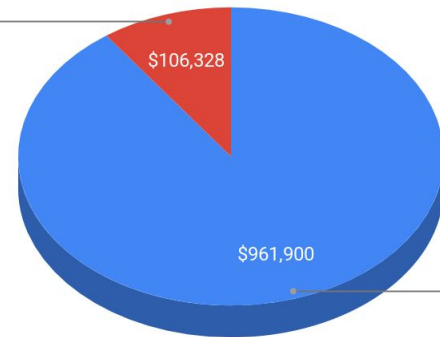
CAMH Foundation  
12.0%



SickKids vs. SKF Revenue

FY17/18, 000's of Dollars

SickKids Foundation  
10.0%



SickKids  
90.0%

# Proposal Development: Tips for Success

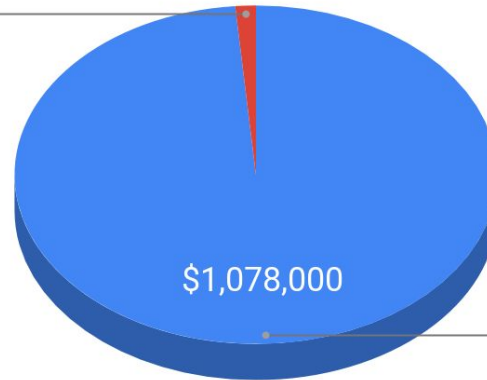
## (Understand your institutional context)

York University Donations vs. Other Revenue

Year Ended April 30, 2018. 000's of dollars.

Donations

1.4%



Other Revenue

98.6%

# 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

Udai Srinivasan, MBA  
Senior Development Officer  
CAMH Foundation  
[udai.srinivasan@camh.ca](mailto:udai.srinivasan@camh.ca)