GG+A QUARTERLY REVIEW

GGQR

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IN THIS ISSUE

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Photo Courtesy of Macquarie University.

GG+A Welcome to the first international edition of GGQR. Our editorial objective is to provide data-rich insights on topics that matter to philanthropy professionals. In this issue, we highlight experiences of our clients around the globe. If you have feedback or suggestions on future content, we'd love to hear from you.

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FOCUS ON

Starting Up in Fundraising – Perspectives and Principles

When John Grenzebach founded our firm in 1961, educational fundraising looked very different from the way it does now.

In the USA, CASE (The Council for the Advancement and Support of Education) did not exist. It would not be formed for another thirteen years, in 1974.

Fewer than a quarter of US universities – almost all of them private institutions - ran an annual fund or engaged in major gifts fundraising. State universities could expect to receive more than three-quarters of their per-student funding from government funds.

In the UK, Harold Macmillan's Conservative government was about to introduce a system of investment in new universities, mandatory maintenance grants, and free tuition that would make university education effectively cost-free for British students until the late 1980s, and would lead most established universities to cease what fundraising they had carried out until then.

So in our 56 years as a consultancy firm, we've seen multiple waves of institutions taking first, or renewed, steps into the realm of philanthropy. In this article, you'll hear from three institutions who have done this in the last decade and a half – the University of Leeds in the UK, Macquarie University in Sydney, Australia, and Aalto University in Helsinki, Finland.

The UK Perspective: The University of Leeds

The University of Leeds in the north of England was founded on philanthropy - it can trace its existence back to 10 donations of £5 in 1831 to establish a Medical School in the city.

In 1925, it ran a spectacularly successful public appeal, supported by the future King George VI, which raised £300,000 in twelve months from individuals across the towns and villages of Yorkshire. In 1951, it was raising substantial sums from annual donations.

But by 2006, when Michelle Calvert arrived from the University of Aberdeen to be Leeds' Director of Development, little coordinated fundraising had happened for more than 50 years.

"The single biggest factor in getting fundraising going again at Leeds was the impetus and support from leadership," says Calvert.

"Michael Arthur arrived at Leeds as Vice Chancellor in September 2004 and was quick to ask what the University was doing to engage its alumni community and encourage philanthropy. He went on a fact-finding tour of the US and became convinced that it should be possible to leverage the size and reach of our own alumni community to support the University's ambitions and ideals."

"Michael showed a commitment to developing philanthropy at Leeds in both a conceptual and practical way. He was very hands on and willing to go out and meet a large number of senior alumni to engage them with the University's vision and mission."

"Being given the investment to build a team was also crucial," Calvert explains. "When I arrived, the alumni and development team totaled about 10, half of whom were quite new. If we'd stayed at that level of staffing throughout the early phases, we wouldn't have been able to make the impact that we did. It took faith from the institution to give us more investment, and we knew that there was a responsibility upon us to do everything thoughtfully, transparently, and well. We made sure we set up systems at the outset that would enable us to evidence the impact of our work and gain the confidence and buy-in of our academic colleagues."

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– Michelle Calvert, Director of Development, University of Leeds

And how about the buy-in from alumni? "There were a number of people who came on board quickly," says Calvert. "We were later getting started in philanthropy than many of our Russell Group peers, so the message we often heard at early alumni events was, 'What's taken you so long?' rather than, 'Why are you doing this?' There was broad agreement that this was the direction we should be taking, and we got very little pushback."

"One of the challenges we faced was that there were thousands of alumni who had had little or no contact from the University - for 30 or more years in some cases. We're very grateful to our academic predecessors that so many of them had enormous gratitude for their time at Leeds in the '50s, '60s, and '70s, and an enduring affection for the University. Some of those people are now our biggest supporters. They understood our context and trusted our serious commitment to engaging for the long term, and have become loyal donors, advisers, volunteers, and friends."

The University has now exceeded its initial £60M campaign goal and is working towards an extended goal of £100M. More than 14,000 alumni have given to the University through the campaign. So what are the things Michelle Calvert and her team are seeing as the important things to focus on for the next decade of philanthropy at Leeds?

"I think the most important thing is how we go from consistent support for philanthropy at the top of the institution to embedding fundraising more broadly and deeply across the University," explains Calvert.

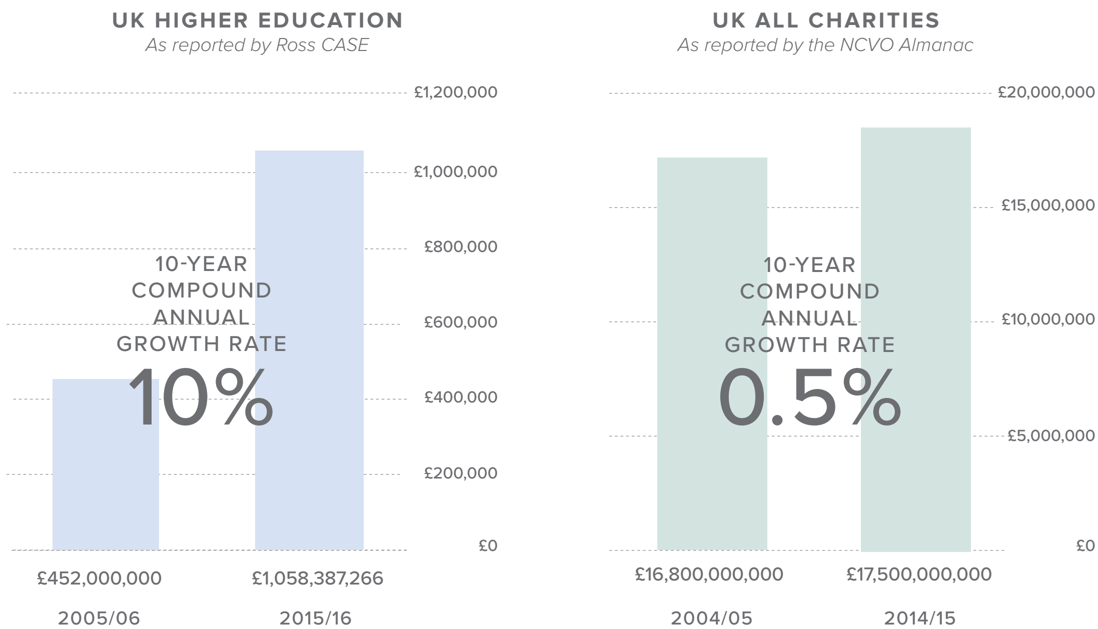
"How can we help our Deans and senior academics think about alumni and development work in a way they may not have done up till now? We're working on embedding alumni volunteering in a much more systematic way – it's such a powerful tool for engaging alumni at all levels, and also our current students."

"If I was giving one piece of advice to someone tasked with starting up advancement at their institution, I'd say – make sure you get the leadership buy-in, and get on with it!"

"Looking back, I think we spent too much time being perfectionists about some of our projects, and we could have moved more quickly. It's like launching a ship – you don't have to have all the interior paintwork complete before you set sail, as long as it's fundamentally watertight."

10-Year Compound Annual Growth Rate Comparisons for Education v. All Charitable Donations

(In billions of pounds)



The Australian Perspective: Macquarie University, Sydney

Macquarie University in Sydney, Australia, is a "new" university. Founded in 1964, it was Sydney's third university and is now ranked in the top two percent of world universities.

Under the leadership of Professor David Wilkinson, Macquarie's Advancement Office has realized significant growth in the last five years, raising AUS$10M in new gifts and pledges in 2016, including its largest gift to date of AUS$2M. This is more than double the amount Macquarie's then Foundation Office raised in 2014. To what does Professor Wilkinson attribute this success?

"I would sum [up our success as a result of] 'leadership and investment.' My view is that without the two, you can't win." - David Wilkinson, Deputy Vice-Chancellor of Corporate Engagement and Advancement, Macquarie University

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– David Wilkinson, Deputy Vice-Chancellor of Corporate Engagement and Advancement, Macquarie University

"We have a Vice Chancellor for whom advancement is an essential priority, and he has me, who feels the same way. So, having this key leadership at the senior executive level is absolutely necessary, but it is, of course, insufficient. You need investment also. Our University invested from the start and will continue to invest."

How much to invest, and in what?

"Well, that comes from having a plan and sticking to that plan. Luckily, in advancement that is what I call a 'play book'; simply, we know what to do, we know what the strategy is. It really is all about execution. We developed a plan – with GG+A – and we invested against that plan."

And what does Professor Wilkinson think will drive future growth in philanthropy at Macquarie for the next 10 years?

"Well, two more factors play out here. The first is the team, and the second is the story."

"We have built the team against a plan, and we build into opportunity. For example, we are the only university in Australia to own and run a hospital. So, clearly medical philanthropy is a big opportunity for us. We built the team around that opportunity and will continue to do so."

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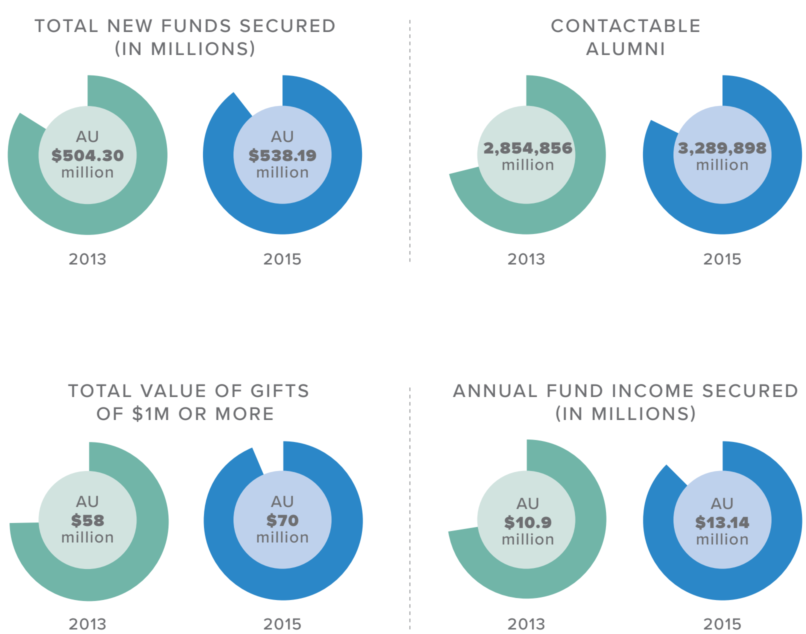
> **– David Wilkinson**

"Regarding the story, or stories, we will continue to refine, clarify, and promulgate them. We will continue to understand who we are, what we stand for, and what we can offer. We will refine these narratives more and more and share them with alumni, friends, and donors, and we expect that we will more and more be able to tell stories about the successful impact of donations. This will build more and more momentum and will create more value."

"Ten years from now, philanthropy will be a substantial contributor to Macquarie University's revenue and success."

Trends in Philanthropic Support for Higher Education in Australia and New Zealand

As Reported by the Council for Advancement and Support of Education



CHARITABLE GIVING TO UNIVERSITIES IN AUSTRALIA AND NEW ZEALAND

This infographic represents findings from the 2016 Survey of Charitable Giving to Universities in Australia and New Zealand that collected data for 2013, 2014, and 2015. The report provides an insight into the overall impact of philanthropy on the higher education sector and is a key source of information on this subject for Australia and New Zealand. Twenty-four institutions took part in the survey, twenty-three from Australia and one from New Zealand.

Donors in 2013

Donors in 2015

The Nordic Perspective: Aalto University, Helsinki, Finland

Helsinki's Aalto University was formed in 2010 via a merger of three existing institutions. Aalto University ranked as Finland's best university in four indicators used in the QS World University Rankings 2018. Aalto's overall ranking was 137th in the world, which means it is among the top 1% of all universities. Over a period of five years, Aalto's ranking in the QS Ranking has risen by 59 places.

"Fundraising in the Anglo-American sense is about 10 years old in Finnish universities," says Teppo Heiskanen, Director for Advancement and Corporate Engagement, whose motto is 'Find a way or make a way.'

"There have been ad hoc donations, for example via legacies, before, but going out systematically to seek them is new. It really started with a Government matched funding scheme in 2011, similar to the one the UK government ran for universities in the mid-to-late 2000s."

"There were two tranches of matched funding – the first was in 2011 and the second is just closing. But many Finnish universities thought the first scheme was a one-off, and so after it closed they let their fundraising staff go. When the new scheme was announced, they had to gear up again very quickly. Now I think there's an understanding among Finnish higher education institutions that this will be a permanent thing."

"There's a challenge inherent in the Finnish context, which is that, by my estimation, only 10% of the total Finnish universities have raised in the matched funding scheme has come from individuals like alumni. Ninety percent is most likely to have come from foundations and corporations."

"There are 14 universities in Finland, but Finland's GDP is the same as Louisiana's. So those 14 universities are all approaching the same foundations and companies."

"It's been a change of perspective for us to think that income from individuals, which has historically been our weakest income stream, might be the one with the largest long-"term potential."

"At the same time, we shouldn't neglect what we have done well up to now. Our discussions with GG+A have shown that we are very advanced in the way we structure our relationships with corporate partners, and this is something that we have worked out by ourselves."

"One of the things we really have to dig into and understand," says Heiskanen, "is how to position Aalto as a cause people will want to give to. There is great affection for the University, but there is no sense of 'obligation' to give, because that has never existed in Finland. So we must show people how giving to Aalto might fit into their wider philanthropic priorities, and that will take time."

"We are lucky that our leadership understands this – this is a 10-year project at the very least, and we are not expecting quick and easy returns."

"One thing that we want to do in particular is learn how to use prospect data better. At the moment we look at prospects 'with our fingertips' – we don't have a systematic enough approach to data. We particularly want to develop that."

“And we are looking into the student experience at Aalto and how advancement fits into that. As a merged University, we need to be very aware of the different identities of former generations, but we are finding they have a very positive view of us. Just recently I was hosting a group of engineers who were in the University of Technology’s class of 1967 – they were all about 85 years old. It was the first time they were visiting the campus in its new identity as part of Aalto. They were so proud to be part of Aalto’s heritage. So I have very strong hopes for the future of our alumni engagement here.”

Conclusion

Here are three very different institutions, varying in age and structure, and geographically far-flung.

But when we look at their experiences of success, two key points emerge which we at GG+A have identified time and again as pre-conditions for success in beginning a culture of philanthropy:

1. **Commitment from the very top. Our interviewees from Leeds, Macquarie, and Aalto all speak to the importance of vision and determination from senior leadership, and the recognition that developing philanthropy is a long-term strategic goal.**
2. **Many institutions that do not succeed in realizing their philanthropic ambitions fail because they get caught in a vicious cycle of initial under-investment, leading to poor results, leading to an unwillingness to make further investment. All three institutions we have spoken to here have recognized the importance of investment as a pre-condition for results, not the other way around.**

And with this commitment, and investment, you can then begin to build an advancement program rooted in your institution’s own unique vision, identity, and mission.

Professional Tips for Growing Advancement Programs

"Refine your narratives and share them with alumni, friends and donors, and expect that you will more and more be able to tell stories about successful impact from donations."

David Wilkinson

Deputy Vice-Chancellor of Corporate Engagement and Advancement

Macquarie University

"If I was giving one piece of advice to someone tasked with starting up advancement in their institution, I'd say – make sure you get the leadership buy-in, and get on with it!"

Michelle Calvert

Director of Development

University of Leeds

"There is great affection for the university, but there is no sense of 'obligation' to give, because that has never existed in Finland. So we must show people how giving to Aalto might fit into their wider philanthropic priorities, and that will take time."

Teppo Heiskanen

Director of Advancement and Corporate Engagement

Aalto University

Q+A

MILES STEVENSON
DIRECTOR OF ADVANCEMENT

The University Of Sheffield.

Miles Stevenson: "Action This Day"

Q: What drew you to a career in advancement?

A: A shaft of sunlight, if you can believe that. I was paying off my postgraduate debts at the University of Bristol. I worked every day of the week. I was sitting in the library staff common room on my own, and suddenly this shaft of sunlight illuminated the job bulletin board. There were three jobs posted – a pig farm worker, a professor of astrophysics, and an alumni relations officer. The alumni relations officer job description said that you had to like meeting people, organizing parties, and traveling the world. It mentioned a little bit of fundraising. This "little bit of fundraising" turned into my career. I have had a tremendous amount of fun because of that shaft of sunlight.

Q: What early leadership lessons have most benefited you?

A: One of them came from my first vice chancellor at Sheffield, Professor Bob Boucher. He said to me, "You can learn something new every day." I like that lesson because it encourages constant learning, and it promotes the idea of the servant leader rather than the flamboyant leader. The servant leader should do things gently, understand that silence is a good strength, and sometimes keep his mouth shut. Listen instead of just charging in – you learn so much more.

"The alumni relations officer job description said that you had to like meeting people, organizing parties, and traveling the world. It mentioned a little bit of fundraising. This "little bit of fundraising" turned into my career."

There was also another vice chancellor, Sir Eric Thomas, who taught me that the life of a leader is never as easy as it looks. Every day you might have three seemingly unsolvable problems, but that's the stimulation of being a leader. Another important leadership lesson is that fundraisers are the diplomats of a university. They must not have big egos. Their role is bringing people together, not thrusting themselves into the spotlight. As fundraisers, we take pleasure in doing things behind the scenes, being patient, being courteous. These are really important skills, and universities look to the development office to have these skills. I observe all of the P's: persistence, patience, passion, perseverance – they are necessary skills as a fundraiser.

Q: What is your formula for success working with internal institutional partners on campaign planning?
A: Academics are often flattered if you have bothered to read their book or attend their lectures. I've seen them absolutely amazed by interest in their subject area. Go back to the classroom every so often, and that's how you get to know your university. It's a very respectful thing to do, and I don't think enough fundraisers do it. Also, get to know your students. Remind yourself why you are doing this work. If I'm feeling low, I spend time with the students. It always makes me feel better.

Q: Do you have a favorite quote or inspirational saying that motivates you?
A: In fact, I have two. The first is Winston Churchill's "Action This Day." During the Second World War, he made labels of this in red. If there are action items, do them right away. As humans, we are too good at putting things off.
The second is Goethe's quote, "Whatever you can do, or dream you can do, begin it. Boldness has genius, power, and magic in it. Begin it now." If you can come up with an idea, just go for it. Too many people come up with excuses—no one is going to give to us, donors don't have an interest in that. So many fundraisers seem chained to their desks. Get off your backside, go out, and meet people.

"Go back to the classroom every so often, and that's how you get to know your university. Also, get to know your students. Remind yourself why you are doing this work."

Q: How do you nurture and retain talent?
A: To nurture and retain talent, you must involve them with senior members of the organization. I like to bring them along to meetings with the vice chancellor, social events at the University, and to the grand dinner. It's a bit like an episode of the TV series "Downton Abbey," where you bring people out into "society" to meet the most influential people. The worst thing you can do to a young professional is to strangle their opportunities.
It's also good to surprise and delight members of the team by including senior leadership where you can. There was a woman who worked here for 35 years in the same position and never asked for or expected a promotion. One day, I tricked her into a meeting with the President and myself. She thought she had done something wrong to be called into a meeting with him. When she walked in, we promoted her on the spot and toasted her with wine. To be promoted unexpectedly by the President never crossed her mind, but she was delighted and grateful for it. That's the type of behavior that nurtures and retains talent.
Another way to do it is by using praise. The higher you get in the office, the less you get praise, but this is an important part of keeping good people.

Q: What advice would you give a young person entering the profession?
A: First, have a positive outlook on life. Have a smile and say, "Bring it on!" That's just the attitude I'd like to be surrounded with. When people develop the "glass-half-full" outlook, senior leadership and donors want to surround themselves with that. Have a genuine willingness to take stuff on and be energetic. Who wants to be surrounded by a load of drains? We want to be surrounded by radiators!

"When people develop the "glass-half-full" outlook, senior leadership and donors want to surround themselves with that. Have a genuine willingness to take stuff on and be energetic."

The other thing I say to young people is always go the extra mile, especially in stewardship. Stewardship is the most underrated or underdeveloped area of fundraising. You can put your personality into it: in the thankyou note, in the different ways you interact with them. You are allowed to be yourself. Thanking a donor is an incredibly personal thing. Humans often kid themselves into believing they are doing the most important stuff in the office, but the magic actually happens from interactions with people. The best work in our field is done face to face. If the donor is prepared to meet with you, it is likely something will come of it.

Q: What is your favorite part of your job?

A: Meeting the student recipients of gifts. I can see the difference we are making in a humbling way.
Also, interacting with the donors. The donors' pleasure is just as important as the students' are, sometimes even higher. I remember one particular student who wanted to pursue her master's degree but could not because she did not have the money to do it. Over dinner with a donor, I spoke to him about making a gift to make a difference, and this student came up in conversation. Her story inspired him to help fund that master's program. This is an example of the donor getting as much joy out of the gift as the students who benefit from it. That young woman received funding for her master's, and ultimately came back for an alumni event and gave an impassioned speech about the importance of giving.

"The magic actually happens from interactions with people. The best work in our field is done face to face. If the donor is prepared to meet with you, it is likely something will come of it."

Q: Are there any gifts that you want to highlight?

A: There is one, from a retired professor, John Roach, who died at age 95. I had known him for about 10 years, and we spent lots of time together. I knew he was writing something into his will for Sheffield, but I didn't know the amount. When John died, I went to his funeral and discovered all of these things about his early life that I never knew: he had served in the Second World War, was captured in Singapore, and spent the rest of the war on the Burma railway. He would have seen absolute horrors, and he never once mentioned it to me. John left us £800,000. You never really know your donors. He was quietly helping, teaching all along, and had seen such horrors in his wartime life. These types of donors really believe in the power of education. Some people do it for vanity or to perpetuate their names, but some people do it because it's the right thing to do. (Read more about John Roach's contribution to the University of Sheffield.

Miles Stevenson established the Development and Alumni Relations Office at the University of Sheffield, UK, in 2002. The office is responsible for raising philanthropic funds for the University, for its alumni relations program and includes the Events Team, which organizes graduation ceremonies, public lectures, and special events (such as H.M. The Queen's visit in 2010). Miles is one of the University's Public Orators for honorary graduates.

Over the last 15 years, the office has grown to a staff of 40. It has established a successful annual fund and legacy program and received six- and seven-figure cash gifts. More than 20,000 donations have been received, and the team has helped to raise more than £40 million in gifts. It also organizes the University alumni relations program for more than 170,000 alumni based in more than 120 countries.

Prior to Sheffield, Miles spent nine years at the University of Bristol's Development Office. Miles was educated at the University of Durham, where he took a Bachelor's degree in History and a Master's Degree in Medieval History, specializing in the Crusades. He has spoken at fundraising conferences in Cyprus, Eire, Germany, Ghana, Italy, The Netherlands, Portugal, Slovenia, and South Africa. He chaired the CASE Europe Spring Institute for four years.

Craig McKenna
Deputy Director of Supporter Relations &
Head of Alumni Relations, Cardiff University

"Driven by Data, with a Human Touch"

"Listen, listen, listen." When asked for his best professional advice, Craig McKenna, Deputy Director of Supporter Relations & Head of Alumni Relations at Cardiff University, is quick with this mantra. "When you're having a conversation, listen. It changes everything. If you don't listen, you can't have a proper conversation. I first heard that at 22. I don't always get it right, but I always try."

At this formative stage of life, McKenna was in Paris; a year spent volunteering at the French-American Centre had led to marriage, and he was settled in the city as a computer programmer. Unconventional beginnings, perhaps; but for the young Mancunian, the French capital represented "the right place at the right time". It's another familiar refrain, and one he would later use in relation to other opportunities.

> *"If you don't listen, you can't have a proper conversation."*
> **– Craig McKenna**

Educated in business and languages at Birmingham, McKenna had no immediate vision of working in higher education. As UK institutions grappled with the concept of alumni relations, he was learning mainframe and backend systems - but asked for the parallel between this and his current role, the reply is instantaneous, "My odd move into computer programming was a game-changer for me and my career."

At a core level, he elaborates, the necessary skillsets are not so very different: "Adding a computer background to my business and language skills made me both touchy-feely and analytical at the same time. Alumni relations offices need to operate like a clicking machine – if you know how things work, who's doing what, and you're ready to listen and react accordingly, you are equipped to deal with anything." This pragmatic approach to systems and people would lead to success throughout McKenna's career.

Timing and circumstances, however, led to a critical juncture. "When 9/11 happened, the computer and IT industry waned, and the company I worked for closed down." Amidst the fallout, the right time and place again emerged. "My father connected me to someone at INSEAD. At the time, I didn't know how good the school was, but I saw an opportunity."

Suzanne Weeks, Director of Customer Services when McKenna arrived at INSEAD, vividly remembers his arrival. Still in his twenties and despite the fact that he was a junior member of her team, McKenna stood out for his pointed confidence and motivation. After just one year at INSEAD, Weeks promoted McKenna to a leadership role, above far more experienced personnel. This decision proved successful for both INSEAD and McKenna: "When Craig grew into the role, he earned the respect of all the stakeholders around him. Instead of shying away, he really owned it. He absolutely has his own point of view, but he is respectful enough to listen and explain his reasoning." McKenna credits his time under Weeks with transforming him from a "shy, introverted creature and giving [him] confidence to open up and take risks."

"When Craig grew into the role, he earned the respect of all the stakeholders around him. Instead of shying away, he really owned it. He absolutely has his own point of view, but he is respectful enough to listen and explain his reasoning."

– Suzanne Weeks, Former Director of Open Programmes, INSEAD

Over the next fifteen years, INSEAD would become the largest business school in the world. In 2012, Joanne Shoveller joined as Associate Dean of Advancement at INSEAD, becoming McKenna's new manager. Currently the Vice-President of Advancement at the University of Waterloo, Shoveller recalls how her professional relationship with Craig blossomed quickly: "In France, very few people work in August. That makes it a great time to get work done because you have time to go for lunch, sit, and talk. That's how I came to know Craig. Prior to my official start date, I spent most of August with my new team, exploring and debating various structural, governance, pipeline, and fundraising issues. The team, including Craig, brainstormed solutions for problem areas and had a report on my desk by the time I officially started in September. Thanks to Craig and the team, we were discussing solutions to our challenges from my first days at INSEAD. From the beginning, we had a game plan to follow."

McKenna quickly impressed Shoveller with his go-getter attitude and network of strong relationships across INSEAD, but his humanity stood out above all. "I had a partner in Craig who was unafraid of the truth, resilient, creative, innovative, and willing to take big risks. There is something disarming about him. He has a way of making people feel at ease, and he is a master of management. Craig's gregariousness and network helped him to manage important change pieces, transforming INSEAD's approach to alumni engagement in the process." Shoveller affirms, "Without his partnership, none of that would have been possible." McKenna readily credits Shoveller with much of his professional growth and success: "Joanne had an amazing impact on harnessing my emotional side. She always told me, 'Take the high road.'" Under Shoveller's leadership, McKenna developed a sophisticated and nuanced understanding of the alumni relations landscape: "It's not just about service providing but about a journey and the key stages in the student-alumni lifecycle." Among other strategies, he endorses bridging the gap between external relations and alumni relations, and the ideology of alumni as brand ambassadors who want to make a difference.

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– Joanne Shoveller, Former Associate Dean, Advancement and Alumni relations, INSEAD, Current Vice-President of Advancement, University of Waterloo

In 2013, McKenna's professional and personal dexterity led him to another promotion, this time to INSEAD's Senior Director of Alumni Relations. When asked how he developed his ability to successfully navigate diverse landscapes and leadership styles, McKenna credits his family. "I come from a family of entrepreneurs. Having been brought up with an 'everything is possible' mindset was very important to me and my professional development."

In early 2016, McKenna accepted an offer to serve as the Deputy Director of Supporter Relations and Head of Alumni Relations at Cardiff University. He discusses his transition from INSEAD to Cardiff in philosophical terms: "I believe in three-year professional cycles – try to work it out the first year, implement the second year, and reflect the third year. I did two of these cycles in my last role at INSEAD, and they were hugely rewarding. When Cardiff reached out, I felt it was the right place and time. I was sad to leave INSEAD but excited for the challenge of a huge university with three colleges and 27 schools." At Cardiff for just over a year, McKenna extolls the opportunities inherent in his new role: "There is so much excitement at my current institution. I have come at a really good time. We have a tremendous opportunity to find the best alumni and connect them with admissions, recruitment, and student employability."

TJ Rawlinson, McKenna's current supervisor and the Director of Development and Alumni Relations at Cardiff, speaks of his hiring with audible fondness: "While we were recruiting for this post, we were looking for a person driven by data but with a human touch. Craig was accustomed to the business school environment where everything needed to be justified on the back of impact. We were lucky to find him at a point in his career when he wanted to move into a broader higher education setting. We found each other at just the right time – Cardiff needed somebody like Craig, and he needed a place like Cardiff."

Similar to Weeks and Shoveller, Rawlinson points to McKenna's balance of personality and business as one of his unique strengths: "Craig loves to play with people, but he's good at doing that with their acceptance and willingness. I've watched him quickly develop a rapport with many Heads of School. The strength of many of my relationships is based on relationships that Craig first developed. Craig is part of a vanguard of a new way of looking at supporter relations and how that contributes very directly to university success."

"Craig is part of a vanguard of a new way of looking at supporter relations and how that contributes very directly to university success."

– TJ Rawlinson, Director of Development and Alumni Relations, Cardiff University

For all of these reasons, McKenna is someone you should know. And what does McKenna know now that he wishes he had known at the start of his career? The value of not being frightened to make mistakes. "It's all a journey, and I'm a great believer that you sometimes have to hit a wall to learn," McKenna explains. "Sometimes you have to make a mistake in order to grow. Without going through these experiences, you would not be the same person. You need to be ready to learn from other people and accept criticism. If you could gobble that up and put it in a drink, that would be great!"

4

REMARKABLE

> "At INSEAD, we are fortunate to have a vibrant, highly engaged global network of alumni. They are generous with their time and expertise with our students, applicants, and the greater INSEAD community. They also are among our most loyal donors. Simply put, they are the school's most ardent ambassadors."

Ilian Mihov
Dean, INSEAD

Professor Ilian Mihov is Dean of INSEAD and the Rausing Chaired Professor of Economic and Business Transformation. Prior to his appointment as Dean in October 2013, Professor Mihov served as Interim Dean and as Deputy Dean for Faculty and Research. He holds his PhD degree from Princeton University.

Professor Mihov joined the INSEAD Economics area in 1996. Since then he has taught macroeconomics and econometrics in the MBA, Executive MBA, and PhD programs, and has won the Outstanding Teacher Award multiple times. His research papers have been included in highly regarded academic journals such as the American Economic Review and The Quarterly Journal of Economics. Dean Mihov's leadership and dedication to the innovation of the business world has led INSEAD to being the top international business school, according to multiple sources. This success has led to a number of interviews for the BBC, CNBC Asia, Agence France Presse, Dow Jones Newswire, and many other newspapers and magazines.

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FROM THE DESK OF...

Taking Your Fundraising Team International

REBECCA PARKES, VICE PRESIDENT, GG+A

International fundraising can complement an organization's traditional efforts and greatly benefit an organization's work – though it is essential to note that international fundraising is not appropriate or beneficial for every organization. Taking fundraising efforts beyond our borders must be done thoughtfully and systematically.

First things first: how does one know if an organization is ready to take its fundraising overseas?

This is a question that often arises in development team conversations, most often after hearing recent announcements of a large gift to an institution from an overseas donor or following the annual release of the Sunday Times "Rich List." Upon hearing the success of other organizations, it is natural to wonder why their own wouldn't find prospects, host events, and fundraise in China, Hong Kong, India, or Europe (or the US, depending on where the institution is located), or anywhere that pockets of wealthy philanthropists are located.

Beyond "should we or shouldn't we," here are a few key conversation starters an organization's leadership must consider as it questions whether international fundraising is the right decision:

+ **Staffing.** How much time are you willing to have each person spend on this project? Who needs to make the time commitment – staff, volunteers, CEO, president or vice chancellor, everyone? How do you deploy or add staffing resources to support this effort?
+ **Storytelling.** What is your mission, and how will you articulate it to an international audience? Is it the same as the story and case for support deployed locally, or does it need to be adapted?
+ **Fundraising.** What is your fundraising plan? How do you make the effort successful financially for the organization? How will you go from building a network to securing gifts?
+ **Committing.** Is there enough of a donor base in the countries, regions, or cities you want to target? Has leadership made trips to the area? How have initial outreach efforts gone? Have you done the research and due diligence to be confident to jump all in?

If these questions have already come up and the answers have been discussed, that's great – your organization is thinking strategically about the possibility of taking fundraising international. Below are four additional questions we think you need to consider. They should sound familiar but are meant to encourage every organization to look at the situation from all sides.

1. Does what we do matter to and resonate with international prospects?

This gets to the core of the case for support. You must explore in further depth whether your mission translates to an international donor or, if not, how it can be adapted. This is where you should work with program staff, academics, and other stakeholders at the core of what your organization funds to understand how your case for support might be attractive to international donors. In addition to the case for support, consider what the proposition might be. What exactly are you asking for from these donors? In most cases, this should be kept at the major and principal gift level in order to gain the largest financial return.

2. What is the best geography for us to focus on?

The answer can't be everywhere. Organizations with international alumni should look where the largest groupings of alumni live. If no built-in alumni constituency exists, prospect research can provide support to understand the prospect base, where they are, how engaged they are, and where your international focus should be. You can also look into areas where your programs are based, annual foreign conferences that program or leadership staff attend, and the impact that your organization has on specific countries. Obviously, choose regions that have the closest affinity to your organization. We recommend starting with one or two foreign locations. It may be that focusing on a key city – as opposed to entire countries or regions – is best for your organization, so explore all possibilities. Your organization must also consider the culture of giving in each prospective country, their charitable tax laws, banking systems, and currency exchange needs.

3. Is there support from board members and local volunteers to engage in international fundraising?

Look at your board, trustees, and volunteer groups (alumni or otherwise) to see who is located in or has links to countries or cities where you are interested in fundraising. A lack of support from local volunteers may affect or sever their relationship with core local fundraising. If there are no current or potential volunteer links in the geographic area you hope to expand to, it will be difficult to build a basic network, let alone establish relationships strong enough to secure gifts.

4. How will we deploy our resources and invest our time?

This will be one of the most difficult questions to answer. Your organization will need a staffing plan, informed by the selection of foreign countries in which you have decided to fundraise. Based on your current staffing and budget, consider whether you need a dedicated staff person; whether you need someone based locally in your office who agrees to travel or someone based in the country or region of interest; whether you deploy an existing staffing position or use budget to add a new one; and whether you need staff members with particular language skills or cultural fluencies.

Lastly, no matter what the conversations around these topics yield, do not forget the time and energy this will require from your organization's leadership. It will need to dedicate the necessary resources to this effort, so make sure it is completely on board in order to make the necessary commitment.

There is a lot to discuss and consider around such a significant decision for your organization. Remember this will be a substantial investment of both time and money, but it might be the right decision if you are able to align staffing, prospects, and appropriate philanthropic opportunities. If you have any questions about the points we've made or the questions we've posed, please do not hesitate to contact me.

REBECCA PARKES

Rebecca Parkes, Vice President, GG+A, brings to the firm 12 years of experience in major and principal gift fundraising, strategic planning, board development and management, and campaign strategy and planning. Her work includes leading a strategic planning study for INSEAD and working with the University of Cambridge on the development of a grateful patient fundraising program. Drawing on her extensive experience, Rebecca has provided a variety of consulting services to a wide array of additional organizations, including public and private universities, healthcare institutions, and international charities and nonprofits.