

More

The best vs the rest: a facilitated discussion for CEAC 2019.

More Partnership

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Questions for further reflection

Further reflections

Map out your strengths and areas for growth.

In a short session like this, we've only had a chance to explore very briefly some of the main characteristics that separate the best from the rest.

To take a more comprehensive approach: set aside 30-45 mins to assess yourself more comprehensively against the various elements we discussed: which areas are you strong in and where are your areas for improvement.

Importantly, when you undertake this exercise ask yourself the question "how do I know this? What evidence could I gather to support my self-assessment?" You may wish to discuss your conclusions with a colleague whose opinion you value.

Build a plan. Considering your answer to the mapping exercise above, with a partner or in a small group of peers, discuss the sorts of actions that a fundraiser could take personally to strengthen areas where s/he wanted to improve. Can you think of activities across the board? In which areas did you find it most difficult to plan concrete actions? What support/development opportunities might the Department as a whole offer that would support growth in this area?

The research. Read both the appendices and the HEFCE toolkit. What common themes do you spot? What changes for a fundraiser as s/he gains more experience of managing and/or philanthropy? What tensions emerge? What 2-3 practical actions could you take to develop yourself further?

Appendix 1: research on the general characteristics of fundraisers

Dr Beth Breeze, Director of the Centre for Philanthropy, University of Kent

Beth's research on fundraisers in general suggests that they share 11 personal characteristics and traits:

1. A high **emotional intelligence**, including being self-aware and aware of how others are feeling.
2. Formative experiences which mean they are **comfortable asking** – Breeze said fundraisers tended to come from backgrounds where it was completely natural to ask for help or to borrow a cup of sugar.
3. **A tendency to engage with people** and communities outside the day job - the study has found that 11 per cent of fundraisers sing in choirs and a fifth attend evening classes
4. **A love of reading** - the study found fundraisers were particularly likely to enjoy popular psychology books
5. **An ability to read people and situations**, and to understand body language
6. **An enjoyment of giving** – 87 per cent of fundraisers said they love to give gifts, and 32 per cent donate blood, compared to 5 per cent in the general population
7. **A great memory** for faces, names and personal details
8. An ability to be “**Janus-faced**” – fundraisers are **charming**, laid back and fun in front of donors, **but ruthlessly well organised** behind the scenes
9. **A focus on organisational rather than personal success** - fundraisers saw themselves as enablers and scene setters rather than visible leaders seeking recognition
10. **A lack of egotism** – Breeze said fundraisers understood that “the plaques are for donors, not askers”
11. **A tendency not to describe themselves as fundraisers** – Breeze said fundraisers rarely described themselves as fundraisers. She used the term “appreciation experts” to better describe what they do.

Learning the craft – achieving success in major gift fundraising.

A summary of MA research carried out by Dale Peter Cooper at the School of Sociology, Social Policy and Social Research, University of Kent

Research goal: to understand who makes the best major gift fundraiser, how they should learn their craft and what they should learn.

Who makes the best major gift fundraiser?

Someone who is interesting and interested in others. Therefore, be sure to use EQ questions during the interview process. You need to know how well they will engage with a donor rather than who has brought in the biggest gift.

How should they learn their craft?

Deliberate practice as a learning method is growing in recognition. Deliberate practice usually requires input from a mentor or coach as effective feedback is essential to effective skill acquisition. Deliberate learning exercises to facilitate this include: the ability to think through an idealised version of the activity e.g. a donor meeting; continual and repeated focus on weaknesses e.g. asking *what could I have done better in that meeting?* and depth of planning and concentration e.g. mapping out in detail a donor solicitation plan.

What are the skills needed?

The research identified the following skill sets that a major gift fundraiser is required to master:

- Personal development i.e. to understand your own cognitive biases.
- Emotional engagement i.e. how well you relate to the cause
- Emotional intelligence i.e. how well you relate to others
- The ability to inspire and motivate
- Communication skills (verbal/non-verbal and written)
- Relationship development skills
- Solicitation skills

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For an easy introduction to deliberate learning read, Daniel Coyle, *The Talent Code: Greatness isn't Born it's Grown*

Appendix 2: the best vs the rest

What differentiates the very best from those who are already good? How can a fundraiser with a track record of good performance over a 7-10 year period stretch themselves further? What are the behaviours, mindsets and attitudes that matter? More Partnership conducted a series of interviews over in April – June 2018 and asked a range of experienced fundraisers, philanthropists and senior organisational leaders for their views. Nine factors that differentiate the great from the good emerged clearly from our interviews.

In comparison with a good fundraiser, the great fundraiser ...

1. **Balances creativity and drive.** She/he is capable of joining the dots, is comfortable with ambiguity and the unknown, is open-minded and willing to horse-trade with the donor in the moment; can articulate their institutional priorities and key projects but is willing to be creative in response and in the moment; not just "this is the menu." Has the confidence to "go off-piste"; shapes their role as much as they take it as a given. S/he is competitive, and relentlessly focused on getting things across the line; s/he has energy; delivers on her goal; brings in the money. Isn't just lucky; makes her own luck.
2. **Understands the organisation, it's potential and how to get things done.** S/he has a breadth of exposure to the institution; is fluent in the organisation; knows how to interpret the organisation; knows the capabilities and potential of their organisation: doesn't over promise; takes actions rooted in a deep institutional understanding; understands execution; knows her organisation back-to-front; builds bridges across, within and into the organisation; brokers relationships
3. **Prioritises building relationships outside the organisation against internal demands.** Has the confidence to set guidelines and then let people go; doesn't get tied up in the "stuff"; manages the tension between management and fundraising; doesn't become the bottleneck in the hourglass; is out of the office, with donors all the time
4. **Overcomes obstacles.** Has resilience and an appetite for risk; capable of withstanding the knock-backs and taking the bigger perspective; is pragmatic; can be put in any situation and is able to handle it: unfazed; is calm under pressure; problem-solves continuously; is comfortable with difficult questions.
5. **Is the Choreographer-in-Chief.** Understands that bigger gifts are won when the relationship has many dimensions; understands that as gift gets bigger, your role becomes more strategic and you are less likely to be involved; plans two, three, four steps ahead; constantly looking ahead to the next step and beyond and working out what to do next; understands what her role needs to be, in the light of what others can deliver; runs meetings well; transitions conversations; claims the ground; makes their case; builds trust; works tirelessly on cultivation, engagement and overcoming internal challenges; is clear about outcomes and her role and what she needs to do to move the conversation to the next step; knows how and when to bring in others; self-confident enough to do so.
6. **Is self-aware, has a capacity to reflect and to make change.** Skilled, thoughtful, bespoke; self-aware and conscious of own strengths and weaknesses; has a realistic assessment of self; is reflective; is hungry for personal development; understands that HOW you work is as important as WHAT you work on (and vice-versa); constantly rehearses and practises; discusses and reflects on practice; doesn't get

stuck and become limited by the scope of their natural talent (which might be considerable but isn't enough).

7. **Has deep relational and emotional intelligence.** Builds trust; is a great influencer: externally and internally with academics and senior leadership colleagues; is someone that others want to work with; has the trust of colleagues and donors alike; is adept at sizing up people, understanding them, what makes them tick, what drives them, what sort of person they are; has a particular sort of emotional intelligence; is a superlative listener.
 - *With donors.* Is personable – “the best get invited to people's family BBQs.” Gets on the same level as the people they are seeing; doesn't act as the junior; can sometimes appear belligerent in some cases! “This is the sort of gift we need you to be thinking about”; isn't thinking “s/he's more important; I'm the servant”; isn't deferential, isn't subservient; is relaxed, fluent with the story; superlative at understanding the donor and their motivations and reading the circumstances; treats celebrities, donors, academics and everyone else on the same level; makes the donor feel at ease
 - *With senior leadership and volunteers.* Has the total trust and confidence of the V-C and is able to share hard truths with him as well as support him.
 - *With academic colleagues.* Knows which academics to work with to get the best results; knows the academics; earns the trust of academic colleagues.
8. **Believes in and is passionate about the cause.** Is authentic; clear about purpose: their own and that of the organisation; is passionate, ambitious, cares about the organisation; show commitment to the cause by staying; longevity is key; while s/he has an ego, ego-less in pursuing the cause; has interest, passion, curiosity, drive, energy
9. **Possesses gravitas.** Has charisma; is relaxed; makes the donor feel at ease; has stature and confidence; has charm yet humility (strategic humility?).

Further reading

From Dr Beth Breeze (University of Kent)

[The New Fundraisers: What kind of people raise money for good causes?](#)

[Million Pound Donations: Who gives them, who gets them, and why?](#)

[The eleven characteristics of successful fundraisers](#)

From the 2014 HEFCE/More Partnership review of fundraising in higher education

[An emerging profession: The higher education philanthropy workforce PDF \(758 KB\)](#)

[Higher Education fundraising toolkit \(including competencies\)](#)

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