

CHARACTERISTICS OF HIGH-PERFORMING INSTITUTIONS

Leadership

- ✓ Academic/Institutional leadership are actively engaged in development.
- ✓ There is a strong partnership between development and institutional leadership.
- ✓ Advancement leadership is included in institutional decision-making and not simply handed the invoice.
- ✓ Stable leadership exists in institutional and development leadership roles.
- ✓ Advancement is seen as an enterprise-wide responsibility, not that of just the staff in development and alumni relations. This includes the board(s) and president as well as top officers.
- ✓ Highly supportive leadership at the executive level (president/chancellor/CEO) and volunteer level (foundation boards, alumni boards, etc.).
- ✓ Leadership doesn't just have "goals" but has aspirations grounded in a strategic vision.

Goals and Accountability

- ✓ There are clear expectations and understanding of goals – including total giving, annual total philanthropy and development officer metrics.
- ✓ There are performance metrics in place that are appropriate to the donor population and individual portfolios. The metrics emphasize meaningful engagement.
- ✓ Advancement is well managed with high levels of accountability throughout the program.
- ✓ Leaders regularly compare program progress and metrics with industry peers (aspirant programs) and industry best practices.

Resources

- ✓ Advancement is provided reasonably ample resources to do the job of maximizing engagement and fundraising at all levels (annual giving, major and principal gifts, etc.)
- ✓ The institution makes a commitment to a consistent and sustained investment in engagement and philanthropy, and it takes a patient and long-term view in evaluating the return on that investment.

Volunteers

- ✓ Long-term volunteer engagement is present at the highest levels
- ✓ Volunteers are highly valued.
- ✓ The institution is open to outside advice – especially from volunteers and donors.

Culture and Values

- ✓ There is strong stewardship of donors and internal partners.
- ✓ The institution is highly donor-centric and views philanthropy as a way for individuals to fulfill their personal priorities.
- ✓ Donors are engaged at all levels and via multiple platforms. There’s “something for everybody.”
- ✓ The institution sees itself as worthy of significant philanthropic investment and has the confidence to ask for gifts commensurate with its aspirations.
- ✓ The institution telegraphs the importance of philanthropy as an asset and as a key to excellence – it celebrates philanthropy publicly.
- ✓ The work environment is of high quality and is progressive and inclusive.

By Douglas G. Stewart, Chairman of the Board, Senior Consultant & Principal

These points of distinction are observations made by Douglas G. Stewart, Marts & Lundy Chairman of the Board and Senior Consultant & Principal. Doug provides strategic and management advice with a special focus on large and complex institutions, especially research universities and academic health sciences centers. Over the past 25 years, Doug has become well known as a speaker, training more than 8,000 institutional leaders, faculty members and staff in the principles and practice of philanthropy.