



**“The Trustee Role in
Raising Philanthropic Support”**

**CASE District 1 Conference
Friday, January 29, 2010
Boston, MA**

Board & Leadership
Development

Strategic On-boarding &
Professional Development


Succession Planning

Development Consulting

Chronicle of
Higher
Education,
Survey
Report : May
11, 2007

How well prepared were you for your first board membership?

Very well	14.5%
Moderately well	44.7%
Slightly well	30.2%
Not at all well	9.8%
Not reported	.8%

A circular graphic with a yellowish tint, showing a faint image of a classical building with columns. The text "Survey 2007" is overlaid in white.

Survey
2007

How long have you been on this board?

Less than one year	10.1%
1-2 years	14.7%
3-5 years	27.4%
6-10 years	25.7%
11-20 years	14.6%
More than 20 years	7.2%
Not reported	.3%



Sit on boards with required annual contributions:

Public	2%
Private, non-denominational	19%
Private, religious	18%



Survey

Trustees report:

- Unrealistically high expectations of ability to “go out and raise funds”
- Unrealistically high expectations of their own willingness to make gifts themselves.



Survey

In ranking of top issues in overall survey, trustees reported that both of these posed challenges for them.

Board's accountability includes:

- **Fiscal Integrity**
- Board Performance
- Educational Quality
- Presidential Search, Assessment and Compensation

**AGB:
Guard the
Fiscal
Integrity**

Among the statements of responsibilities:

...participate in fund-raising, both through personal philanthropy and advocacy.

WG Survey
to CAO's: 11
respondents

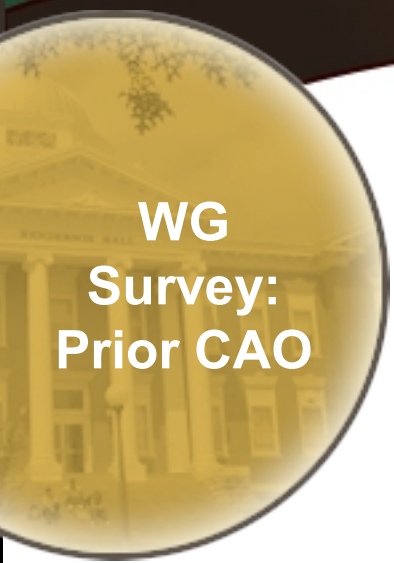
50% single campus

16.6% public (single or multiple sites)

25% private

WG
Survey:
CAO
currently

- 33.3% served 1-2 years
- 25% served 6-10 years
- 16.7% served over 20 years



WG
Survey:
Prior CAO

- One prior institution 44.4%
- Two prior institution 44.4%

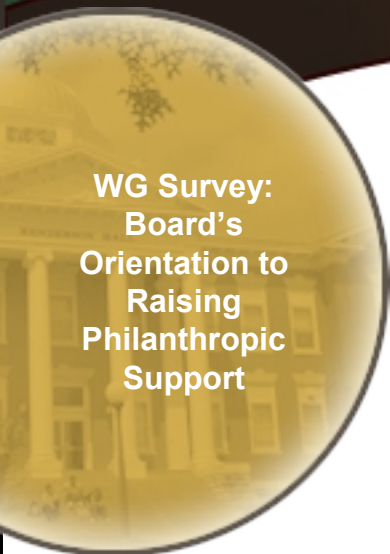


WG
Survey:
Areas of
Expertise

- Experience in raising philanthropic support/track record 72.7%
- Working with boards and other key volunteer leaders 63.6%
- Sophistication in understanding mission and vision of institution 54.5%

WG
Survey:
Key
Elements
to Team
with
President

- Shared vision of institution 81.8%
- Relationship building with prospects and donors 72.7%
- Leadership style 45.5%
- Relationship with board 45.5%
- Shared vision of success 45.5%



- Satisfactorily oriented and educated 45.5%
- Not well oriented and educated; could be improved 45.5%
- No orientation and education received 9.1%

WG Survey:
Critical
Challenges
Facing Board
in Raising
Philanthropic
Support

- Has not been a priority of board in recent years 63.6%
- Under-resourced advancement program 54.5%
- Current economic times 45.5%

WG Survey:
Rate Level of
Importance of
Time Spent on
Philanthropy
Given By
Trustees

- Highly important, significant time devoted (above 40%)
0%
- Very important, considerable time devoted (30-40%)
18.2%
- Somewhat important, some time devoted (20-30%)
36.4%
- Important, little time devoted (10-20%)
18.2%
- Not as important, little time devoted (less than 10%)
27.3%



Yes

54.5%

No

45.5%

WG
Survey:
Role in
Raising
Support

- Cultivation 30%
- Solicitation 10%
- Identification 30%
- Stewardship 30%



WG Survey:
expectations
as a top
priority

Yes 72.7%

No 27.3%





WG Survey:
expectation
to make
annual gift

Yes 81.1%

No 18.2%





Required

No

Recommended

Yes



\$50,000+	16.7%
\$5,000 - \$9,999	16.7%
\$2,500 - \$4,999	16.7%
\$1,000 - \$2,499	50.0%

**WG
Survey:
Average
Gift**

\$25,000 - \$49,999	18.2%
\$10,000 - \$24,999	18.2%
\$5,000 - \$9,999	18.2%
\$2,500 - \$4,999	27.3%
Below \$1,000	18.2%



WG Survey:
Advancement
Committee of
Board

Yes 90.9%

No 9.1%



Trustee
Panel

Toni Wolfman '64, Smith College

Brian Lee, Tufts University

Cynthia Woolbright, The Woolbright
Group



**Contact
Information**



Brian Lee, Vice President for
University Advancement
Tufts University
80 George Street
Medford, MA 02155
Tele: 617. 627.3143
Email: brian.lee@tufts.edu

Cynthia Woolbright, President
The Woolbright Group
Stony Point Landing
667 Midship Circle
Webster, NY 14580
Tele: 585.787.0325
Email: cynthia@woolbrightgroup.com
Website: www.woolbrightgroup.com