

Report on Advancement and University readiness for Phase Two of the \$50 million Campaign

20 July, 2014

This report is the outcome of a brief analysis of the philanthropic culture at Trent University to advise the president in his advancement role with the university.

Observations and recommendations are drawn from:

- advancement documents and fundraising data dating back to 2007
- a two-day campus visit including interviews with thirteen members of the Trent community comprising staff, senior faculty, Board members, volunteers and donors
- my 26 years of advancement experience in the university and independent school sectors, in Canada and abroad, establishing new, larger and more successful advancement teams and successfully leading three 40 to 100+ million dollar campaigns.

Observations:

- The Advancement Team comprises committed and enthusiastic professionals eager to advance the institution.
- The VP, Julie Davis, is well-regarded by senior Trent leadership, donors, and volunteers.
- The KCI reports, and other policy and procedure documents and functions developed since 2006, provide solid guidance and a framework for advancement activity and success, in particular for campaign activity.
- The Trent campus presents as a warm, inviting, and safe campus providing a nurturing and productive student experience.
- Annual fund activity and the recent successful legacy campaign demonstrate a foundation of positive feeling and support for Trent.
- Trent does not have a history of consistent philanthropic success. Major gift opportunities and successes must be acquired and sustained.
- The major-gift prospect list requires considerable qualification work. For example, many of the prospective seven-figure donors may be unrealistic.
- The Advancement office has not been well-supported over the past five years. The Advancement functions are not scaled to the size, complexity, and advancement demands of Trent.
- Insufficient engagement of the internal university community (students, faculty, staff, Board, and senior management) will continue to undermine advancement's effectiveness and ability to demonstrate their value to the institution. Without board and senior management confidence and support, advancement cannot be successful. The Advancement Committee must have a high profile and ensure that it keeps the board well informed of advancement plans and progress.
- Although board participation is at 100%, their giving should be at a higher level. Board members should be solicited with face-to-face meetings, as should all senior faculty, staff and key volunteers,
- Trent University should celebrate its successes more frequently. Constituents want and need to hear positive stories. These must be communicated effectively for advancement purposes and also for admissions.

- Trent is viewed as somewhat remote and disconnected from Peterborough and its founding community. The president and senior management need to be involved and engaged with the region and viewed as partners in development.
- Alumni need broad-based and effective representation to help them have a voice at Trent that is respected and heard. The proposal to establish an Alumni Advisory Council with a clearly-defined role has merit.
- A lack of focus with the remainder of the \$50 million campaign threatens quick success. Priorities need to be few, exciting, and compelling; they also need to reflect the new vision and university strategy, and be easily managed and sustainable over the longer term. Plans that include concept drawings and a proposed operational structure are required for presentation to prospective donors. In the case of the Student Centre, and the fact that a student levy has already been approved, more detailed plans are required immediately.

Opportunities:

- The university community (internal and external) understands the role and importance - particularly in today's economic environment - of a robust and successful advancement function.
- A lack of success in fundraising, in particular with major gifts and the current \$50 million campaign, will continue to erode the institution's advancement function and efforts.
- The broader Trent community is invested in Trent's success. There are many prospective donors with capacity who are ready and willing to support Trent, with the right ask. Future success in fundraising, in particular major and transformational gifts, will come from donors who take a longer-term view of the institution. The university cannot afford to be hampered by a parochial mindset.
- Many view Leo Groarke's arrival as key to Trent's future. A dynamic, strategic, well-articulated vision from the president that is mindful of the university culture and backed by the university community, will bring cohesiveness to the needs of the institution.
- A strong case for support, backed by the internal university community, will communicate these needs to prospective volunteers and donors.
- While the student experience has changed since the early collegiate days, it is still equally positive and satisfying for the current student body - this needs to be communicated effectively to alumni. Students are passionate about their Trent experience and want to support their university and its future.
- The development of the 'next generation' of leaders, volunteers, and donors should come from an informed and engaged alumni group – newer alumni who are emerging community and business leaders.
- The 50th anniversary celebrations will help rekindle alumni and local community passion and appreciation for Trent. This is a wonderful opportunity for the president and for Trent to communicate the new vision and to strengthen relationships with a view to advancing the institution.
- Communicate the successes of the \$50 million campaign to date, aligned with the new vision.
- The student levy towards the student centre should be included in the campaign total. As a current priority, the proposed student centre resonates with alumni and should attract

support. Recognizing student support is critical to ensure that students have ownership in the campaign and in the future of the university. It will also help inculcate the value of giving back to Trent.

- A well-supported and well-resourced professional advancement staff, coupled with committed and trained faculty champions and volunteers, can communicate the new vision and case for support with enthusiasm and confidence to prospective donors.
- Ensure the needs of the university align with the interests of prospective donors.
- The VP External Relations & Advancement knows what is required to move forward with the advancement team. Hold her accountable, but give her the support she needs to take advancement at Trent to the level it should be operating at.
- There are keen and dynamic faculty at Trent. Engage and educate them in advancing the university and in becoming champions for advancement internally and for support externally. This should also be a responsibility of all Deans and College Heads, assuming that they have the experience, training, and support to do so.

Key recommendations:

- Support the staffing requirements of Advancement as proposed in the report to the board dated 25 April, 2014. These positions should be permanent to ensure the longer-term success of relationship-building and fundraising at Trent.
- Hold advancement accountable and measure performance against industry benchmarks.
- Promote the value of the advancement function. All senior management should be invested.
- Keep the board engaged with advancement and its challenges and successes.
- Develop and articulate a new vision for Trent University as soon as possible.
- Confirm a few focused and internally-supported priorities to complete the \$50 million campaign.
- Establish relationships with the top twenty or so prospects. Consult them to confirm your case for support, then solicit their support.
- Ensure appropriate recognition and strong stewardship for donors and volunteers.
- Support the development of a university proud of its past, in tune with its local community, engaged with its prospective supporters, and focused on delivering a great student experience.

Conclusion:

While the board has approved a \$20 million phase two of the \$50 million campaign to be conducted from 2014 – 2019, the president would like to wrap this campaign up within the anniversary period while ensuring that robust relationships are developed and nurtured to help ensure future fundraising success. This is a viable option if the president, senior management and advancement staff are able to reflect on the challenges, develop a strong plan, communicate it well, and act quickly. The campaign can and should exceed \$50 million if current and prospective funding opportunities are not lost. Counting the student levy towards the student centre makes sense as long as it is transparent; it is accepted practice at many universities.

Following the anniversary, successful completion of the \$50 million campaign, and time to deliver on commitments made during the campaign, the president should be in a good position to begin preparing for the next campaign.

The president should continue his current advancement path with vigor to seize and profit from available opportunities.

There are challenging and exciting times for Trent University. Thank you for the opportunity to spend some time at Trent. I look forward to a return visit.

Sincerely,

Scott Hayter