COLLABORATIVE LANES…
PRESENTED TO
THE UNIVERSITY OF NORTH CAROLINA
SYSTEM ADVANCEMENT SYMPOSIUM

BY BENJAMIN R. CASE, PRESIDENT, CASE CONSULTING SERVICES, INC.

MAY 15, 2018
COLLABORATIVE LANES...
DEFINITION OF COLLABORATE

A. Dictionary: To work, one with another; cooperate

B. Business: Collaboration is a working practice whereby individuals work together to a common purpose to achieve business benefit.

C. Nonprofit fundraising: Collaboration is...
   1. Waiting for my turn?
   2. Participating in a single program proposal with multiple cooperating units?
   3. One proposal for multiple separate units?
DEFINITION OF COLLABORATE

D. Collaboration* at the conceptual level, involves:

1. Awareness – We become part of a working entity with a shared purpose
2. Motivation – We drive to gain consensus in problem solving or development
3. Self-synchronization – We decide as individuals when things need to happen
4. Participation – We participate in collaboration and we expect others to participate
DEFINITION OF COLLABORATE

D. Collaboration* at the conceptual level, involves:

5. Mediation – We negotiate and we collaborate together and find a middle point
6. Reciprocity – We share and we expect sharing in return through reciprocity
7. Reflection – We think and we consider alternatives
8. Engagement – We proactively engage rather than wait and see
WHY COLLABORATE?

A. Happier donors:

1. Donors want it
2. Donors see one color
3. Donors have multiple interests. At one contributing institution, 75% of $1M+ donors give their next $1M+ gift to another unit

B. Maximize gifts from donors – amount and frequency

C. Achieve greater institution. “Grand challenges”
CHALLENGES WITH COLLABORATION

A. False confidence
B. Pressure to conform
C. Promotes social and intellectual laziness
D. Invisible price tag + opportunity costs = costs more than benefits
E. Remove political ramifications by appearing to be including others in thought- or decision-making process
CHALLENGES WITH COLLABORATION

F. Can’t get to doing the “deep work”

G. Cares more about $500K for department than $5M for university

H. Attempted blackmail—Leverage collaboration participation to get something else

I. Rogue “hero” fundraisers

J. Over-promise, under-deliver

K. Wrong people collaborating
CHALLENGES WITH COLLABORATION

L. Casting a racehorse as a plow-horse

M. Faculty rewarded for individual accomplishments, then asked to agree on a plan that does not get them anything they need

N. Collaborative chaos that leads to lack of accountability
PRINCIPLES FOR SUCCESSFUL COLLABORATION

A. Must have **trust and respect** for all involved:
   1. Authentic transparency
   2. Common values

B. Must be **donor-centric** – listen to the donor
PRINCIPLES FOR SUCCESSFUL COLLABORATION

C. **Leadership** must lead:

1. Make collaboration happen
2. Be constantly committed to collaboration
3. Establish institutional priorities that demand “big-dog funding:”
   a. Institutional strategic planning drives “big ideas”
   b. Advance what we do well or what we can do that no one else is doing
   c. Advancement has to be at the table
PRINCIPLES FOR SUCCESSFUL COLLABORATION

D. Must create and maintain a “collaboration culture:”

1. Act in the best interest of the institution to advance its mission and highest priorities
2. Shared, common goal
3. Reward system for everyone
4. Earn the right
5. Hire right
6. Execution – understanding of how we will work together
PRINCIPLES FOR SUCCESSFUL COLLABORATION

D. Must create and maintain a “collaboration culture:”

7. Open communication protocols
8. Continuity of personnel
9. Balance performance with results
10. Clear, challenging aspirations
11. Energized workforce dedicated to productivity
12. Knowledgeable, informed management
PRINCIPLES FOR SUCCESSFUL COLLABORATION

E. Establish **incentives:**
   1. Real financial impact
   2. Greater good – unit benefits
PRACTICAL SUGGESTIONS FOR SUCCESSFUL COLLABORATION

A. Accountability required – determine metrics for success
B. Must have technical support – front end
C. Success breeds success
D. Everyone has to be at the table
E. Be practical – timing will not always be right
F. Know what you have that is a lure
G. Solve the bottlenecks
PRACTICAL SUGGESTIONS FOR SUCCESSFUL COLLABORATION

H. Purposeful meetings:

1. Chancellor/provost with CDO
2. C-suite with CDO
3. Dean/Department heads with CDO/unit CDO
4. Dean/Department heads with unit fundraisers
5. Department/college meetings with unit CDOs
6. CDOs, PGOs and MGOs
PRACTICAL SUGGESTIONS FOR SUCCESSFUL COLLABORATION

I. Engagement of volunteers
J. Sunset if necessary
K. Matching gifts can spark
L. Know your donors:
   1. Donors will say different things to different people
M. Can be easier for a fundraiser to collaborate with a donor than a colleague
PRACTICAL SUGGESTIONS FOR SUCCESSFUL COLLABORATION

N. Become “collaboratively mature:”

1. Develop and strengthen desirable collaboration qualities

2. Understand your collaboration blind-spots:
   a. Trust
   b. Impatience
   c. Racehorse vs. plow-horse
   d. Control
   e. Fear of failure
THANKS TO MY COLLABORATORS

A. Kim Blair – Senior Principle Gifts Officer, Virginia Tech
B. Barrett Carson – Vice President for Development, Georgia Tech
C. Chandra Christian – Principle Gift Officer and Strategic Planner, NC State
D. Anne Clark Hathaway – Annual Giving Officer, NC School of Science and Math
E. Robert Shepard – Vice President, Alumni Affairs and Development, Duke University
F. Brian Sischo – Vice Chancellor, University Advancement, NC State
G. Stephen Smith – Senior Vice President for Institutional Advancement, Thomas Jefferson University and Jefferson Health
H. Christina Walker – Director of Principle Gifts, NC State
I. Michael Ward – Director of Development, North Carolina Textile Foundation, NC State
J. Lauren Carr Wiggs – Former: Major Gifts Officer, NC School of Science and Math, Current: Account Manager, Aym Technologies, LLC
K. *Information from AIIM
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