



Strategic Fundraising for Leaders

23 January, 2019

Woburn House, London, UK

08.45 – 09.15	Registration and Refreshments	Woburn Foyer
09.15 – 09.30	Welcome Nina Cohen Bohn , Director of Principal Gifts and External Relations (Asia Pacific), London Business School Kary Kelly , Director of Development, Courtauld Institute of Art Bruce Bernstein , Executive Director, CASE Europe	Woburn Hall
09:30 – 10:30	Dynamic Leadership – How to be Flexible and Dynamic in Leading Philanthropy How can you work best with the leaders of your institution to prepare them for their role in philanthropy? How do both the roles of VC/CEO/Dean and Director of Development and the relationship between them, shape the culture of philanthropy at your institution? What can you do more of, start doing or stop doing in this area to have real impact on your results with donors and the community as a whole? Susie Balch , Associate Dean of Advancement, London Business School Professor Sir Andrew Likierman , Former Dean, London Business School, Professor of Management Practice in Accounting Kirsty MacDonald , <i>Deputy Principal (Advancement), Royal Academy of Music</i> Professor Jonathan Freeman-Attwood CBE , <i>Principal, Royal Academy of Music</i> Chair: Nina Cohen Bohn , Director of Principal Gifts and External Relations (Asia Pacific), London Business School	Woburn Hall
10.30 – 10:45	Tea, Coffee and Networking Break	Woburn Hall
10:45 – 11:30	Breakout Session – Choose one Topic Theme: <i>Building a Collaborative Work Environment to Achieve your Advancement Goals</i>	
1.	Roundtable: Governing Bodies and Governance in Fundraising This session will focus on the roles and responsibilities of governing bodies in fundraising. Topics to cover include oversight or permission for	Foster and Bloomsbury

strategy and execution, their level and consistency of giving (annual/campaign), the impact of their actions in developing a culture of philanthropy, managing financial expectations in small, medium and large offices.

Kary Kelly, Director of Development, Courtauld Institute of Art
Luke Purser, Development Director, English Heritage

- 2. How can I get People IN Advancement to Work Better Together?** **Tavistock**
- This session will show how different structures of organisation and advancement teams can lead to a positive working environment where all stakeholders understand the importance of embedding philanthropy throughout an institution.
- It will show the importance of a clear awareness of an institutional strategy and how this is implemented, measured and understood. There will be suggestions for how to engage positively and effectively with academic colleagues and the senior leadership of the institution as well as all colleagues working across the advancement/development function.
- Above all, the session will encourage debate about how we can all collaborate and ultimately create a sustainable philanthropic offering for our organisations - regardless of size, resource or structure.
- Bill Abraham**, Director of Development, University of London
Christine Jeffery, Director of Development Services, University of Oxford
- 3. Stakeholder Management of Marketing and Comms Teams** **UUK Boardroom**
- Although Development teams operate within different organisational structures, fundraising success relies on the understanding and support of colleagues in marketing and communications. This session will give examples where Development is most effective when it is aligned with institutional strategy and where a case for philanthropic support draws on an organisation's overall brand narrative.
- Fiona McWilliams**, Director of Development and Communications, Natural History Museum
Ian Rowley, Director of Engagement Group, University of Warwick
- 11:30 – 12:30** **Creating the Right People Culture for High Performance of Teams and Individuals** **Woburn Hall**
- According to multiple global research studies the average tenure of development professional is 18-24 months and staff turnover is consistently cited as one of the greatest challenges facing development in Higher Education. In a sector where the reliance on building long-term relationships is key to financial sustainable success how can we build the right culture for employees to thrive and create an institutional brand proposition that will encourage the right people to apply and develop within?
- In this session Karen and Tess will share thoughts and ideas that will assist you in developing the right talent management strategy for your

organisation or department. One that is all encompassing including areas of team resilience and agility to respond to change, ensuring that new starts “start well” and that performance both at the high end and non-performers are either rewarded or addressed.

The session will explore how to not only attract the right talent but how to ensure you are not neglecting your high performers. Tess will share CRUK’s approach to building an employer brand proposition, and why CRUK have invested in a role where the sole responsibility is to develop people and their high performance.

Karen Cairney, President, Cairney and Company

Tess Nixon Spiller, Head of High Performance and People, Cancer Research UK

Chair: Kary Kelly, Director of Development, Courtauld Institute of Art

12.30 – 13.30 Lunch

13:30 – 14:00 Summary and Action Steps from the Morning

You've just been engaged in a half day of insights and information, how do you use it / share it when you get to the office tomorrow.

- Summary of morning sessions
- Top tips for impact and dynamic leadership
- Tips for creating the right people culture

Woburn Hall

14:00 – 15:00 Campaign Roundtables – please select one

To Campaign or not to Campaign – How do you Know?

What information, decisions and evidence do you need before deciding to plan a Campaign? Should you do a feasibility study in all cases? And how do you manage the expectations of your team, leadership and the finance office? This round table discussion will cover the do's and don'ts of one of the most important decisions of your leadership.

Penny Seward, Director of Development, RADA

Alison Woolley, Director of Development and Alumni Relations, Goldsmiths

Boardroom

We've Decided to go for it – now what?

Just because your organisation has green lighted your campaign, doesn't necessarily mean that any more investment, a rapid culture change or clarity on fundraising priorities is imminent. The journey has just begun and your strong leadership is now more important than ever to ensure campaign readiness, a happy team, and ultimately success.

This session will cover early and mid-stages of a campaign including stakeholder engagement, staff resilience, developing a compelling case for support even when there is a lack of institutional clarity on what is needed. From recruitment and retaining the team to growing a culture of philanthropy, and maintaining momentum after the Campaign takes off -- how do you do it all?

Joanne Donahoe, Director of Development and Alumni Relations, University of Southampton

Kary Kelly, Director of Development, Courthauld Institute of Art

Tavistock

Woohoo We Did It! What's Next? The In-Between Years...

Completing a campaign; hitting target numbers or exceeding them, gaining the trust and admiration of donors and your entire stakeholder community all are the benefits of a successful campaign - but the looming question of what's next is not far behind. This session will cover:

- How to keep staff retained
- Keeping the support of donors, acknowledging fatigue, excellent stewardship
- Still fundraising, and setting next targets
- Post mortem and creating a new vision
- How to get even more faculty, volunteers and donors involved

Ruth Beckinsale, Director, Business Planning, London Business School

**Foster and
Bloomsbury**

15:00 – 15:30 Refreshments

15:30 – 16:30 Let's Hear from Our Donors: "When It Works Well What Does It Look like and When I Am Unhappy How Can I Tell You"?

We'll hear from a number of donors about their experiences with organisations and charities, including their suggestions for excellence in cultivation, recognition, relationship management and stewardship.

David Kotler, *CEO and Co-founder, Access Corporate Finance*

Philip Lawford, *Director, Linbury Trust (Lord Sainsbury's foundation)*

Lucia Halpern, *Chair, Friends of the Courtauld and Mentor, Charity Trustees*

Chair: Kary Kelly, Director of Development, Courthauld Institute of Art

**Woburn
Hall**

16:30 – 17:30 The Magic is in the Mission

From a bold beginning to a sustainable future, Sir Anthony Seldon shares his alchemy for success

Sir Anthony Seldon, *Vice Chancellor, The University of Buckingham*

Chair: Nina Cohen Bohn, Director of Principal Gifts and External Relations (Asia Pacific), London Business School

**Woburn
Hall**