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# Unlocking and building a strong fundraising partnership with your board

Session #37  
Wednesday, 1 June 2022



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## SESSION STRUCTURE

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1. What does a culture of philanthropy mean in the context of a board?
2. Partnering with your Chair
3. Partnering with board members (both individually and as a group)
4. Building a new fundraising committee
5. Q & A

## Culture of philanthropy

**Shakeela Begum, JD, PCC, MCCTP**  
**Director, Gift and Estate Planning**  
**The University of British Columbia**

“The most effective board members are often those that are passionate about the organisation and are willing to ask others to join them in supporting a cause that is important to them.”



## Culture of philanthropy

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Talking about money is difficult for many people. Fostering a culture of philanthropy means that everyone in the organization should be able to proudly talk about the work and impact of donor dollars and how the organization seeks to leverage them for maximum impact.

My advice would be to help board members understand together and individually what it means to be a fiduciary (legal responsibility of being a board member) and then helping each person (through coaching) become more comfortable with how they can support the organisation. It might be opening doors, hosting an event, asking for sponsorship, role playing, accompanying a fundraiser on a stewardship call etc...building up their comfort.

- Shakeela Begum

# Culture of philanthropy

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## What does that mean in the context of a board?

- Starts with a passion for the cause
- Transparency – speak openly and unapologetically about philanthropy
- Supportive culture – education and skill development
- Leading by example – do new board members see others making introductions?

## Partnering with your Chair

- The  between CEO, Chair, and advancement
- Having Chair regularly and publicly  when Board members are active in philanthropic activities.
- Can your Chair identify, cultivate, and engage?
- My Chair doesn't get fundraising?! What am I supposed to do now? 
- Remember it's a two-way street!     

## Kate Barnett



- Director of Community Relations, Melbourne Grammar School
- Former Director of Development Melbourne Law School

## Kate Barnett: partnering with your chair

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“In the past five years there have been two instances where I’ve taken on a new role. **During the recruitment process**, I’ve sought the opportunity to meet informally with the Foundation board chair.

Those conversations are more than due diligence into how much the board buys into fundraising. I’ve also wanted to know if we both **share the same goals, passions, and alignment of values.**

I think **building that early partnership with the chair** and the trust that’s developed subsequently allows for a productive partnership so we can really do our best work together.”

## Imogen Bielby



- Manager: Alumni Services  
University of South Australia
- Former Development Manager  
University of New South Wales  
Art & Design

## Imogen Bielby: partnering with your chair

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**“We invited the Chair of our UK Foundation Board to co-host a dinner with the Dean of Law** while the Dean was traveling to London. The dinner would introduce and promote the Law faculty’s priorities within the Case for Support.

Qualified alumni in the region received personal invitations. The correspondence was upfront that philanthropic priorities would be presented, and equally it was an occasion for discussion, hearing topical industry issues, as well as networking with fellow alumni.

**This engagement helped to bring the Chair closer to the Campaign issues, whilst demonstrating how the Chair and advancement team could work together.** Through the introduction of qualified alumni and by providing thorough briefings and discussions with the Dean, the Chair was able to engage more deeply with topics as well as take a lead in hosting and cultivation, including follow-ups with those guests that attended.

**Within just the first month following the dinner,** prospects, advisory council volunteers, guest speakers and offers of venues for further London engagements were identified.”

## Board member engagement

**Brigette Sancho**  
**Director of Alumni & Donor Relations**  
**University of Melbourne**

“It is important to recruit board members strategically.”



# Board member engagement

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Make sure members have the skills, knowledge and are willing to work in alignment with the university to support growth and drive donations. You want to make sure members have the following attributes:

- Credibility with your stakeholders?
- Strong links to your community?
- The ability to advocate for your mission?
- A track record of donating to your organisation?

Tailored role description for board members will help manage expectations. It is important to ask them what time frame are they prepared to commit to (1-2 years is optimal). What activities are they willing to participate in which may include event attendance, private dinners, zoom meetings, etc. Set fundraising targets and/or engagements with donors.

- Brigitte Sancho

## Board member engagement

1. Encourage them to give themselves – time, treasure, talent
2. Train your board to fundraise/ask – onboarding, books, courses
3. Leverage individual and corporate giving – use networks
4. Give them the Good Messaging – case for support, elevator pitch
5. Appropriately resource your board – admin support is critical
6. Let them thank donors – and thank the board often!
7. Keep them engaged – evaluation, survey, contact between meetings
8. Create an inclusive environment

## Building a new fundraising committee

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-  and 
- Identifying and pursuing board members based on what they've previously done, not what we hope they'll do for us.  
#thoughtsandprayers
- Don't ask board members to raise money. 
- What if our institutions reimaged board service with fundraising at its core? 

## Kate Meyers:



- Head of Development, People, Society & Culture  
University of New South Wales

## Kate Meyers: building a new fundraising committee

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"You and your dean (or principal) need to be on the same page regarding the **board's purpose and objective**. If fundraising is not one of the key roles, it is unlikely to be a good use of your time to attend meetings, etc.

Also, where a fundraiser can shine and gain credibility is **putting in work between meetings**. The meetings are just to update and report back on actions. You get more traction working on a 1:1 basis with board members where you can collaborate on a particular prospect or project."

## Kim Clarke



- Head of Foundation,  
Saint Ignatius' College Riverview

“With proper guidance and leadership, a well-connected and respected group of volunteers can be invaluable to the success of a campaign.”

## Kim Clarke: building a new fundraising committee

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“At Saint Ignatius’ College Riverview, the Foundation team has **recently established an advisory group to assist with raising funds and awareness** as part of our preparations for a capital campaign.

With our volunteers, we’ve embraced the importance of **not taking a “one size fits all” approach** and have engaged each of them individually, taking into account their experience, preferences, and available time.

As our campaign preparation efforts evolve and progress, we are sensitive to what our group has the capacity and the will to achieve.”

## Final advice

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- If you have a disengaged board, don't give up. You may be able to bring them around.
- Strive for full board participation in giving, but remember there are different ways to give.
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# Presenter Details



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# Appendix

# CONTEXT

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Any opening remarks