



A Planning and Implementation Partnership

Challenges and Long-Term Opportunities for Philanthropic Growth

Florida A&M University confronts a number of challenges to enhance philanthropy and engagement. Based on information gleaned from the FAMU website, the appointment of Shawnta Friday-Stroud as Vice President for Advancement (VPA) creates the expectation that the University will seek a more rigorous approach to advancement and engagement.

Successful fundraising depends on relationships, built over a long period of time, with major benefactors. FAMU must inspire confidence in major benefactors who seek assurances about the quality and scope of FAMU's philanthropy program. It will be critical for the VPA to jump start the cultivation of existing prospects and assure benefactors that FAMU has the required sophistication to be an excellent philanthropic investment. Advancement must re-double its efforts in the discovery process to identify new leadership gift prospects. Aligning with a transition partner who has closed 7 and 8 figure gifts can give FAMU a head-start building a solid base of operation. This task does not solely rest with the VPA. Florida A&M President Larry Robinson and the FAMU Foundation will be crucial players in the big-gift process.

Ideally, a seamless partnership among Foundation President Jemal Gibson, University President Robinson and Dr. Friday-Stroud will result in the infusion of crucial private resources and policy changes that allow growth, change and innovation. The VPA has some significant advantages. She is an alumna of FAMU and was the leader of the strategic planning process "*FAMU Rising*."

Sweeney/Philanthropy's Unique Qualifications in Transition Planning and Execution

Bob Sweeney, the Principal of Sweeney/Philanthropy, LLC (Counsel) spent 44 years leading the philanthropy programs for some of the most respected universities in the nation, including the University of North Carolina at Chapel Hill and, for the past 26 years, the University of Virginia. During his tenure at UVA alone, Mr. Sweeney raised over \$5 Billion. Today, no other practicing philanthropic advisor (serving the higher education field) has personally been responsible for raising more private support. In addition to fundraising, he is highly experienced in alumni engagement, having led one of the most progressive programs in public education. Years as the leader of UVA's Public Affairs division has given him invaluable understanding of crisis management, addressing several grave situations that presented themselves affected UVA while he led the public affairs area.

Conducting searches that hired and trained well over 100 senior Advancement officers, Counsel understands that technical expertise is only a small part of the equation. Loyalty, mastering complexity, navigating politics and embracing (and sometimes changing) institutional culture have far more to do with the VPA's ultimate success than simply creating solicitation strategy or "closing" gifts. Counsel is uniquely qualified to assess an organization, grasp its traditions, politics and distinctive DNA. He will become a thought partner and mentor to the VPA, aiding her in setting an aggressive fundraising agenda.

Elements of the Partnership

A Partnership with Sweeney/Philanthropy may include some of the following:

1. **Triage** A successful partnership outlined in this document will require a significant investment on the part of the FAMU Foundation board leadership, the President and the VPA. The financial aspect is only one element of the required collaboration (it is expected that the FAMU Foundation will provide most/all of the funding necessary to pursue fundraising counsel). The most important consideration will be the investment of time, trust and the advocacy of all three partners. Positive chemistry among all parties will be crucial to success. The triage will include:

- ✦ Review of all institutional organizational and Advancement materials and data
- ✦ Creating a baseline of knowledge about the FAMU's programs, staffing and fundraising track record
- ✦ Understanding the prevailing culture, governance structure, and longevity of senior administrators
- ✦ Grasping the purpose, role and fundraising potential for the FAMU Foundation

- ✦ Assessing the rate of and reasons for turnover among Advancement leadership and staff
 - ✦ Determining the willingness of senior institutional leaders to consider changes in organizational structure and reporting relationships.
2. **Triage Objective**-Counsel must gain a thorough and detailed understanding of the FAMU Advancement program and Foundation, their organizational structures, staffing, performance metrics, budgets and infrastructure. This will inform and guide a potential assessment project, as well as insight that will benefit thought partnership and accelerate the mentoring process resulting in a productive relationship with the VPA.
3. **Assessing the Advancement Program and Operations**-Provide a thorough and detailed analysis of the current Advancement program, its organizational structure, staffing, performance metrics, budget and infrastructure that will inform and guide the VPA in determining areas of opportunity and problems that need to be addressed immediately. Determine if there are systemic issues limiting institutional success in fundraising. Recommendations will be made to strengthen every element of the Advancement program. Comparative data will compare FAMU performance with its peer and aspirational university affiliated medical foundations. This Assessment will include up to 25 in-person interviews with key administrators, Advancement staff members and governing/Foundation board members. A detailed written report will be presented to the FAMU Foundation board, President Robinson and the VPA.
4. **Creating an Action Plan**-Based on the information gleaned for the Advancement Assessment, work in partnership with the VPA to generate a plan that will address:
- ✦ Infrastructure
 - ✦ Organizational structures aligned to facilitate the best possible fundraising leverage
 - ✦ Re-allocation of personnel and resources for maximum productivity
 - ✦ Securing the appropriate Advancement budget (based on best practices and peer financial data)
 - ✦ Create viable, comprehensive major and principal gifts programs (ranging from prospect identification to stewardship)
 - ✦ Building an Advancement communications program that will focus on both gifts and institutional strategic priorities
 - ✦ Strategy for building strong relationships with the other VPAs, deans and volunteer leadership

5. **Serving as a Trusted Advisor to the VPA President and Foundation Leadership**- During this period of assessment and rising expectations, there will be a number of strategic questions that will arise dealing with the current staff, proposed organizational structure changes, budget imperatives and the inevitable issues that simply cannot be identified in advance. There will also be thorny political issues that all senior Advancement leaders face. Counsel will work closely with the VPA (always keeping President Robinson informed) both in person and through regularly scheduled phone appointments to assess key issues and recommend the appropriate course of action.
6. **Providing for Program Continuity**-Members of the staff may experience anxiety about the future of the Advancement program and their role in it. Counsel will provide periodic, onsite consulting during the time of the Partnership. Counsel will engage the staff and keep the lines of communication open while providing specific advice on important fundraising and engagement issues.
7. **Creating a Personal Strategies Plan**-Provide the VPA with a recommended one-year plan based on best practices and input from the President, Foundation leadership and staff. This plan will include important meetings with the key volunteers, governing board members, community leaders, Florida State University partners and principal gift benefactors/prospects. It will also make recommendations on immediate and near-term strategic action, restructuring, staffing and point to possible initial solicitation “wins” so that the VPA gains significant credibility.
8. **Provide Thought Partnership and Mentoring**-An important part of the Partnership process will be regular check-in phone calls (conversations may last up to 1 hour or longer per week) during the assignment period. Coordinated by the VPA’s office, these phone sessions will focus on the VPA but may, from time to time, include Foundation leadership, deans, advancement directors and possibly selected volunteer leadership. Discussions will range from general mechanics to thorny issues and operational surprises. Focus will be directed to systems and personnel issues that are essential for the early success. Team dynamics will be emphasized to build crucial esprit-de-corps.

Investing in the Transition Partnership

President Robinson and the FAMU Foundation Board recognize that certain investments will produce exponential ROI. Investing in a comprehensive effort to properly prepare FAMU to secure millions of dollars in philanthropic support is potentially significant resource generator. Positioning the VPA for a fast start can be a “game-changing” proposition and is certainly worth a financial investment equal to, or exceeding, the cost of the executive search process.

The possible scope of a Transition Partnership might include:

- ✦ Reviewing all appropriate documents
- ✦ Analyzing all giving data
- ✦ Preparing a comprehensive Assessment and Recommendation report (including three (3) days on-site; ten (10) days of report writing and creating a final document following approval of the VPA)
- ✦ Meetings with the President, Foundation leadership, VPA, Deans and Senior Administrators
- ✦ Committing to a projected six (6) days spent on-campus providing on-going counsel
- ✦ Providing five (5) hours per month of telephone consulting
- ✦ On-Boarding assistance/mentoring to the VPA
- ✦ Creating a one-year action plan with the VPA



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Presidents/Chancellors with Close Working Relationships to Bob Sweeney

Mauli Agrawal Chancellor, University of Missouri Kansas City (consulting client)

Chuck Ambrose Former President, University of Central Missouri (consulting client)

Edward Ayers President Emeritus, University of Richmond (former UVA Dean)

Paul Baldasare, Jr. President, St. Andrews University (former direct report to RDS)

Gene Block Chancellor, UCLA (former UVA Provost)

John Casteen President Emeritus, University of Virginia

Nancy Cable Chancellor UNC Asheville, former President, Arthur Vining Davis Foundations (consulting client, fellow Board member The Better Angels Society)

Steven Currall President, University of South Florida (consulting client)

Philip DiStefano Chancellor, University of Colorado Boulder (consulting client)

Fr. Dennis Holtschneider Retired President, DePaul University (fellow Trustee, N.U.)

John M. Palms Retired President, University of South Carolina (consulting client)

Linwood Rose President Emeritus, James Madison University (UVA Board of Visitors)

John Simon President, Lehigh University (former UVA Provost)

Teresa Sullivan President Emeritus, University of Virginia

Peter Todd Director Général, HEC Paris (consulting client)

Gerald Turner President, SMU (consulting client)



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Program and Operations Assessments Conducted by Robert Sweeney:

Barry Foundation

Florida State University

HEC Paris

Loyola Marymount University

National University of Singapore

North Carolina State University

Neumann College

St. Gertrude's School

Southern Methodist University (SMU)

University of Colorado Boulder

University of Missouri-Kansas City

University of South Carolina

University of South Florida

Virginia Military Institute (VMI)

Wintergreen Nature Foundation