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# Adapt-Migrate-Perish

## EXPLORING A NEW VALUE PROPOSITION FOR CFR

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## **Executive Summary.**

The landscape of corporate and foundation relations (CFR) work has changed significantly over the past decade or so. Effective practices and associated indicators of success also have evolved. Funding preferences of both national foundations and corporate entities have become more prescriptive. Although overall philanthropic distributions by corporations and foundations continue to increase, the foci and mechanisms of distribution of grants and related contributions, as well as competitive access to same, have changed the competencies required for effective CFR work. Reimagined indicators of impact and success should follow. The effects of these evolutions are experienced differently by CFR officers in various settings. At best, they require adaptation. At worst, exploration of new career opportunities.

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Informed by this context, this work begins with a focused and first-of-its-kind examination of leading from the middle (LFM) as a core competency and high art for CFR officers working in all settings. Knowingly or not, effective CFR officers are increasingly reliant on LFM skillsets. By recognizing and developing LFM competencies with focused intention, CFR officers can add strategic value to institutions well beyond the financial and activity measures captured in typical metrics for CFR success. When this emerging trend is understood, valued, nurtured, and rewarded by institutional

leadership, CFR officers can leverage their deep institutional knowledge, alongside connections to internal and external portfolios of faculty, staff, and funders, to advance strategic priorities of their institution. Anchoring our argument in leadership theory and developing it through broad practitioner input invited at multiple national conferences, we present evidence supporting a new value proposition for CFR professionals in higher education.

## **Target Audience**

Corporate and foundation relations (CFR) is an unusual and fascinating profession. Practitioners may reside within a combined CFR office—as is the case at most liberal arts colleges and many larger schools as well—or hold more specialized positions in foundation relations (FR) or corporate relations (CR), as is the case at many research-intensive universities. Smaller operations—including many single-person offices—might oversee sponsored projects or government relations work in addition to CFR responsibilities. Emphasizing core similarities across these roles and contexts rather than shades of difference, “CFR,” as used in this paper, refers to all combinations and permutations of the corporate and foundation relations role (unless otherwise specified).

Associated placement of CFR officers on organizational charts is similarly varied, with reporting lines through Advancement, Academic Affairs, Research Offices, Offices of the President, and combinations thereof (depending on titles, roles, and responsibilities). Regardless of organizational placement, however, CFR professionals have the core responsibility of securing philanthropic and other types of support from organizations, particularly private foundations, corporations of all sizes, and—in the case of

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some “combined” CFR and sponsored project shops—state, federal, or other public agencies. No matter one’s position or positioning within the institutional setting, however, success in CFR work requires the ability to communicate—and often translate—effectively across a diverse set of stakeholders ranging from faculty to administrators to the wide array of organizational (and even individual) prospective funders.

This white paper reflects our collective experiences overseeing combined CFR and sponsored programs offices at two national liberal arts colleges, establishing a sponsored project office at a public regional university, and directing the foundations and corporations office for a health system affiliated with an R1 research institution. However, the content is far richer and broadly representative due to generous input gleaned at national meetings of CFR, CR, FR, and allies from colleges and universities of all types over the past three years (please see Project Design for more information). If you count yourself among the wide array of “CFR professionals,” this white paper is for you. If you work in other roles within higher education wherein success is predicated on significant collaboration and complex communication with a heavy dose of project management prowess, this white paper pertains to you. If you supervise or have interest in hiring any such CFR or similarly skilled professionals and seek to optimize their impact at your institution, please read on.

### Rationale and Motivation

This paper responds to two “tensions” that are familiar to most CFR professionals: one related to professional identity, the other to the shifting landscape of organizational funding and administrative leadership in U.S. higher education. Those CFR folks housed in Advancement or Academic Affairs—the most common locations for CFR generalists—work closely with other non-CFR professionals engaged in the higher education version of what Govindarajan and Trimble (2010, 2016) refer to as “Performance Engine” responsibilities. These divisions are tremendously important for sustaining the excellence of education. CFR fundraising for buildings and classrooms, endowed professorships, financial aid, and research infrastructure supports the work of the Performance Engine and map readily to associated predictors and measures of success.

However, many organizational funders are particularly interested in advancing “innovative” ideas through pilot programs or similar ventures. If one uses Govindarajan and Trimble’s definition of “innovation” as

*Tension and change often yield evolution.*

meaning “anything that is new to the organization with uncertain outcomes,” CFR professionals also frequently find themselves doing the work of innovators. Govindarajan and Trimble argue against embedding non-incremental innovation programs within the

Performance Engine because, although each relies on the other, they are fundamentally incompatible in certain ways. Innovation is nonroutine and uncertain whereas Performance Engines are optimized to be repeatable and predictable. Innovation favors experimentation whereas Performance Engines require productivity and efficiency. **Approaches to organizing and planning one’s work vary significantly as a result. Metrics for success, and thus performance evaluation, should differ as well.** Govindarajan and Trimble’s work focuses on for-profit companies. However, the distinction they draw between innovation work and Performance Engine work bears some resemblance to the “tension” that many CFR officers must learn to navigate just by virtue of their “identities,” their positions, roles, and responsibilities for securing organizational fundraising to advance everything from capital projects to innovative leading-edge pilots.

The other “tension” motivating this work has to do with real changes in higher education leadership and shifts in traditional organizational funding sources over the past decade. CFR professionals in different types of institutions or roles have experienced those changes in different ways. Of the numerous ways one might portray this “shifting landscape tension,” the following four warrant particular attention:

- **Senior administration in higher education is aging:** Eddy et al. (2016) report that the average age of college presidents is now 61. They argue that one way to build the pipeline is to cultivate the next generation of senior leadership from midlevel leaders. Midlevel leaders, including, we believe, experienced CFR professionals, offer stability to an organization. They typically stay longer than top-level leaders and are key players in the implementation of strategic plans. Due to less visibility, mid-level positions also can accommodate leadership choices that involve courageous yet ethical risk taking or innovative experimentation.
- **New generations are changing fundraising culture:** Advancement and other colleagues tasked with deepening engagement with alumni leaders are well aware of this trend. The EAB (2016) argues convincingly that many millennial and Gen-X alumni seek greater levels of customization in how they engage with colleges. They care about not only what they can do for their institution but also how they benefit from volunteerism or other types of philanthropic investment. As younger generations launch their own foundations and join the boards of existing ones, we expect this desire for personalization and focus on outcomes to inform philanthropic behaviors of these organizations. Relatedly, individuals in these generations emerging as major gift prospects are likely to share this perspective, which may generate notable increases in project-focused philanthropy requiring formal evidence of impact. Like project grants from organizational

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fundraising colleagues. The structure and stewardship of such gifts require CFR-like competencies that complement the strengths typically exhibited by major gift officers (MGOs) and other fundraising colleagues.

- ***Grant-making approaches are evolving:*** Increasingly, national foundations want to fund higher education projects that are not only innovative and sustainable but also scalable across the sector. Foundation leaders are encouraging colleges and universities to demonstrate their tax-exempt public benefit by placing heightened focus on elevating the broader communities surrounding campus. These emphases contribute to ever-greater focus on complex collaboration across institutions within and outside the education sector.
- ***The CFR field of competition is changing, at times unpredictably:*** From 2017 to 2019, the Voluntary Support of Education (VSE) surveys indicate that corporate giving to higher education was nearly flat in unadjusted dollars and decreased by up to 2.4% annually when adjusted for inflation. Although foundation giving over this span shows variable growth, those data increasingly are inflated by significant grants made by family foundations that do not typically reside in CFR portfolios (accounting for nearly 50% of foundation giving in 2019). CFR officers working in the undergraduate liberal arts setting report dwindling numbers of foundations focused on this sector. All CFR officers are sensing heightened competition for corporate and foundation dollars, even as the costs associated with higher education continue to rise.

Tension and change often yield evolution. The current narrative suggests that changes in our CFR world are upon us *and* that exciting emerging opportunities are within our reach; hence the argument for amplification of our work and its impact on our institutions' strategic priorities, specifically by a more explicit focus on leading change from the middle. Before we explain our efforts to apply this lens to CFR professionals, however, let's take a closer look at the phrase **leading from the middle**.

### **The LFM Lens**

So, what exactly is meant by the phrase "leading from the middle" or LFM? During one of the presentations leading to this paper, we shared a video illustrating the concept from a project management perspective. In the clip, Alicia Aitken of the Australian communications company Telstra (2016) describes LFM as "efficiently and effectively leading big pieces of work from ideation to value creation without holding positional power." She highlights LFM as a leadership function rather than (only or even primarily) an administrative one.

Examining LFM within the CFR role logically begins with a working definition of leadership in higher education. Stone and Coussons-Read (2011) define “leadership” broadly as involving “activities that effect

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change.” Gmelch and Buller (2015) view “leadership” as “the process of influencing a group of people to move in a common direction toward a (frequently visionary) goal.” They posit that “[i]f you are not bringing about change, you are not leading anyone anywhere.” Eddy et al. (2016) drill a bit deeper by examining leadership by professionals at the middle of organizational charts. They argue that “[f]ocusing on midlevel

leadership creates a wealth of potential; the stability of operations in the middle helps support the type of disruption and innovation necessary for the institution to adapt to an uncertain future.”

Perhaps a step or three ahead of higher education, researchers in business and management have outlined many recommended approaches for leading change from the middle. Two examples demonstrate the breadth of such theories:

In his 2014 book *Leading Change from the Middle: A Practical Guide to Building Extraordinary Capabilities*, Jackson Nickerson outlines a stepwise, quasi-scientific approach to the topic. One compelling element of Nickerson's model is the strong emphasis on identifying the right stakeholders as early as possible when confronting a complex project and categorizing them appropriately to ensure inclusion in optimal ways throughout the change effort.

In contrast, Frank Barrett, himself a jazz pianist and professor, published a book in 2012 entitled *Yes to the Mess*. Barrett outlines a much more improvisational approach to leadership that embraces the need for ethical risk taking. Arguing in favor of what he calls “provocative competence,” he writes that “[i]n jazz, as in business, we need leaders who do this—men and women who support imaginative leaps, who can create a context that enhances creative possibilities and triggers glimpses, sudden insights, bold speculation, imaginative ventures, and a willingness (even an insistence) that people explore new possibilities before there is certainty and before they fully comprehend the meaning of what they are doing.”

Nickerson, Barrett, and many other theorists are experts on leading from the middle and theories of change. Applying this work to our years of experience as CFR professionals, we sought to answer a core question: How might an explicit focus on the competencies required to lead from the middle as CFR professionals amplify the impact and optimize the value of CFR work? Fortunately, we did not need to answer this question on our own.

## Project Design

The work summarized in this paper is the result of a two-year series of presentations and interactive brainstorm sessions that we conceptualized and facilitated, with valued input from dozens of colleagues.

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An initial focus on the ability of CFR officers to practice LFM within complex organizations, specifically institutions of higher education, inspired further exploration of the value proposition for CFR officers within the shifting landscape of the education sector. Listed chronologically, these sessions include the following:

- Sauder, R., & Wamsley, M. “Amplifying the Role of CFR Leaders at Small Colleges and Universities.” CASE Annual Conference for CFR Officers, Chicago, Illinois, May 2017.
- Sauder, R. “Connectors, Cultivators & Catalysts: Amplifying the Role of CFR Officers.” Opening Presentation for CASE District 2-Funded Regional Conference entitled *Leading Change from the Middle: Strategies for Corporate & Foundation Relations Officers*, Lancaster, Pennsylvania, October 2017.
- Sauder, R., & Wamsley, M. “Leading from the Middle: Claiming Your Full Potential.” NACRO Annual Conference, Atlanta, Georgia, July 2018.
- Sauder, R., & Wamsley, M. “Adapt-Migrate-Perish: Exploring a New Value Proposition for CFR.” Structured Brainstorm at CASE Annual Conference for CFR Officers, Washington, D.C., May 2019.
- Marshall, N., Sauder, R., & Wamsley, M. “The Changing Role of CFR.” Structured Brainstorm at SCAFRO Annual Conference, Bloomington, Illinois, July 2019.
- Sauder, R., & Wamsley, M. “Adapt-Migrate-Perish: Exploring a New Value Proposition for CFR.” Structured Brainstorm at NACRO Annual Conference, Pittsburgh, PA, July 2019.

Conference attendees from CASE and NACRO—the two most prominent professional development organizations for CFR professionals—and members of SCAFRO (Some Corporate & Foundation Relations Officers, a limited-membership organization for CFR officers at top national liberal arts colleges) generously participated in these sessions, shared ideas, and provided us with invaluable feedback. The structured brainstorm sessions, the source of much of the information distilled herein, attracted approximately 200 participants (110 from CASE, 35 from NACRO, and 55 from SCAFRO), with a few peers joining more than one of these sessions.

The first three sessions listed above were structured as typical presentations. They provided an important contextual and theoretical springboard for the subsequent three collaborative sessions. Drawing on

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effective practices in creativity and design thinking, those next three sessions invited CFR practitioners to share their own experiences, perspectives, and ideas via structured brainstorms. These sessions emphasized the divergent-thinking process but culminated in opportunities for convergence (via recording “hits” or positive votes) and related discussions. In addition to the structured brainstorming, the SCAFRO session participants helped us

begin to frame ideas in ways designed to inform a model job description that more accurately encompasses the value that CFR professionals can deliver in the undergraduate liberal arts setting if effectively positioned for impact and success.

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To further inform this work, we also reviewed data from the three most recent biennial surveys conducted by NACRO. For reference, NACRO currently has between 600 and 700 members, of whom 250 to 300 responded to the most recent survey. Those data supported themes and trends generally consistent with those expressed by session participants at both CASE and SCAFRO conferences, while lending further clarity to some of the brainstorming contributions received during the 2019 NACRO conference session.

The brainstorm questions and results, presented in the form of word clouds labeled with the source of the data, appear in the **Appendix (Part 1)**. The model job description for CFR officers working in undergraduate liberal arts settings is available in the **Appendix (Part 2)**.

### Findings

The processes outlined in the preceding section generated an impressive amount of data in response to seven questions exploring the roles, responsibilities, impact, and untapped potential of the CFR profession in higher education today. The questions themselves emerged from our past work on applying the LFM lens to the CFR profession. We reviewed all data, combined similar terms listed multiple times, and used the results—weighted by how many “hits” (or positive votes) responses received through the interactive convergence process at the end of each session, to create the word clouds in the **Appendix (Part 1)**. **Table 1** lists the questions as well as the most popular responses to each.

As mentioned previously, these data strongly reinforced findings of recent NACRO member surveys highlighting the emerging trends of non-financial metrics and other qualitative engagement measures, suggesting that activity measures are rightly growing in importance relative to monetary or more traditional metrics. We also noted strong thematic overlap between LFM competencies and roles that surfaced in brainstorming sessions and findings presented in both the 2011 NACRO white paper [Five Essential Elements of a Successful Twenty-First Century University Corporate Relations Program](#) and NACRO’s 2019 [Research Report: Industry Perspectives on Academic Corporate Relations](#).

At the suggestion of several CASE session participants, we next mapped the seven questions to core components of a typical job position description. Incorporating thematic responses crowd sourced from CFR practitioners and colleagues who joined the sessions, this model position description for a CFR generalist reflects the roles, responsibilities, and competencies that today’s CFR practitioners identified as essential to their value proposition in higher education (**Appendix [Part 2]**). It differs substantively from many “traditional” CFR position descriptions. Specifically, the role should strongly emphasize **forging and leveraging** strategic partnerships (both on campus and off) and facilitating collaborative idea generation in support of grant seeking and external partnerships, rather than cling primarily to the traditional orientation toward resource development via proposal submission. In this new and reimagined version, the processes leading to grant-seeking readiness are given equal or greater weight than the act of seeking funds itself, an acknowledgment of the concrete role that idea generation and program development can play in moving an institution closer to its own aspirations.

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This model job description can inform leaders' efforts to unlock the full impact of CFR practitioners' competencies and leadership potential as they consider how to structure a new CFR operation, restructure an existing one, or add new lines—regardless of reporting structure. The reimagined CFR position description should position new hires to optimize collaborative idea generation, innovation, and the advancement of strategic plans through fundraising (irrespective of source).

**Table 1: Key Themes Distilled from Brainstorming**

Questions	NACRO	CASE+SCAFRO
If you were charged with maximizing your impact on campus for the greater benefit of the institution, with revenue generation as a secondary priority, what are some possible measurable indicators of success?	<ul style="list-style-type: none"> <li>College-Corporate events</li> <li>Industry guest speakers</li> <li>Exec training programs</li> <li>Touchpoints per company</li> </ul>	<ul style="list-style-type: none"> <li>CFR site visits</li> <li>Faculty interactions w/Development</li> <li>Faculty-staff contacts</li> <li>Student success</li> <li>Community and economic dev</li> </ul>
What core competencies define the best CFR officers and their work?	<ul style="list-style-type: none"> <li>Ability to translate</li> <li>Collaboration</li> <li>Intellectual curiosity</li> <li>Imagination</li> <li>Dot connecting</li> <li>Seeing big picture</li> <li>Strategic thinking</li> <li>Thought partnership</li> </ul>	<ul style="list-style-type: none"> <li>Informed</li> <li>Process management</li> <li>Relationship management</li> <li>Detail oriented</li> <li>Dot connector</li> <li>Leading from middle</li> </ul>
If you were to make the case for the ROI for your position but could not use financial measures, what indicators would you highlight?	<ul style="list-style-type: none"> <li>Campus silo destruction</li> <li>Strategic vision</li> <li>National/Int'l partnerships</li> <li>ID of future major donors</li> <li>Knowledge of real-world trends</li> </ul>	<ul style="list-style-type: none"> <li>Cross-campus partnerships</li> <li>Convenings</li> <li>Faculty relationships</li> <li>Stewardship relationships</li> <li>Proposals</li> <li>Positive press</li> </ul>
What are the potential dangers of business as usual for CFR officers?	<ul style="list-style-type: none"> <li>Fewer dollars in the door</li> <li>Lack of new ideas for partnership</li> <li>One-off sponsorships</li> <li>Career stagnation</li> <li>Portfolio stagnation</li> <li>High turnover</li> </ul>	<ul style="list-style-type: none"> <li>Undervalued skillset</li> <li>Lack of career mobility</li> <li>Wrong metrics</li> <li>Transactional gifts</li> <li>Limited revenue generation</li> </ul>
What are missed opportunities associated with business as usual?	<ul style="list-style-type: none"> <li>Seat at strategy table/credibility</li> <li>New revenue streams</li> <li>Big ideas</li> <li>Connections with colleagues</li> </ul>	<ul style="list-style-type: none"> <li>Communicating impact</li> <li>Metrics showing impact</li> <li>Strategic thinking for program design</li> </ul>
What aspects of typical CFR positions, practices, or expectations limit your ability to collaborate with peers in other divisions?	{Not asked}	<ul style="list-style-type: none"> <li>Access to data</li> <li>No trust</li> <li>Poor communication</li> <li>Competing priorities</li> </ul>
If you could reimagine the CFR role in terms of institutional impact rather than the type of donor with whom you typically work, what titles better capture that impact or the full potential of the role?	{Not asked}	<ul style="list-style-type: none"> <li>Catalyst</li> <li>Connector of ideas</li> <li>Disruptor</li> <li>Translator of ideas into fundable ones</li> <li>Strategic visionary</li> </ul>

## The Upshot for CFR Professionals

By the nature of their roles, CFR practitioners sit at the intersection of multiple disciplines, interface with colleagues in a wide variety of academic and co-curricular roles, and are natural coalition builders. This positions them to explore new areas of interest, as well as dramatically expand their knowledge of the institution and adjacent subject matter, all while continuously providing service to their organizations. When considering potential opportunities for career growth and advancement, professionals who strategically rely upon these connections are poised for future success.

Strong internal and external networks are necessary but not sufficient components for CFR officers to optimize their impact. Because most professionals in this role do not possess positional authority or the

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requisite oversight to compel others to join grant-seeking or partnership efforts, they must instead lead change and coalitions from their place in the middle of the institutional hierarchy. Building successful project teams on a college or university campus requires intention, a commitment to maintaining momentum in the face of institutional change, and focused application of the competencies necessary to influence others.

CFR colleagues seeking to more fully articulate and realize the value of their roles have different career development goals and thus may choose to emphasize different competencies. These are learned behaviors, competence in and mastery of which require frequent practice. Applied in combination, they offer a scaffold from which to exercise leadership and propel the success of CFR professionals, their

teams, and their institutions. For presentation purposes, the core competencies are presented here by career transitions to which they most clearly relate; however, CFR officers functioning optimally employ all these skills simultaneously.

## Growing in Place

CFR professionals typically develop strong commitment to their craft and their institutions. The work requires the ability to see the big picture, while maintaining a firm command of even the most minute details. It requires a distinctive combination of writing, thinking, and ability to engage in academic discourse. Because CFR work is often accompanied by intellectually engaging content, fascinating colleagues, and an endless supply of new regulations, guidelines, and laws, there is always something new to learn.

For those CFR officers who appreciate the stability of their current position or institution yet seek to improve their own efficacy, drawing on and amplifying the following key skills will enable their talents to truly shine:

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- **Building and maintaining trust and credibility**, as any CFR professional can tell you, is integral to this work. Faculty and staff trust practitioners with securing funding for their life’s work—a deeply personal enterprise on which to collaborate. Likewise, funding agencies are providing significant resources to the institution on the basis of the information provided to them and, in some cases, longstanding institutional relationships. Securing and working diligently to sustain this trust is key.
- Continuing to practice **strong communication skills** is essential in any line of work, but this is especially the case in a field characterized by constantly changing regulations and funding guidelines, one in which new programs or funders are always around the next corner. Proactively sharing relevant and timely information—whether with faculty, staff, or leadership—and running effective meetings, promptly identifying next steps, articulating action items, and following up on the same, remain among the hallmarks of a CFR operation that is able to advance programs and move projects forward.
- Another competency common to CFR practitioners is a deep **understanding of institutional culture and power structures**. Generally, this is borne out of the necessity of knowing who can approve requests, remove barriers, or provide much-needed resources. But ultimately, it becomes key to successfully navigating the institution, knowing the right players to consult and when, and making strategic judgment calls when confronting tricky situations.
- Similarly, the best CFR officers **know their influence levers and when (not) to use them**. Demonstrating sound decision making, establishing credibility, and recognizing potential challenges before a project is funded or corporate partnership created can build invaluable amounts of political capital within an institution. An awareness of when it is appropriate to call upon such capital is critical to the long-term career success of CFR professionals, who, by the nature of their role, often encounter situations requiring particular flexibility and institutional accommodations.
- Although perhaps counterintuitive, **proactive development of new skills** is an excellent way for practitioners to stay nimble and adapt to the changing funding landscape. As institutional needs, grantor requirements, and technology change, keeping pace while remaining in place is vital. Equally valuable is the ability and commitment to scan the horizon, determine what the college or university might need, and seek to acquire those new skills, pieces of knowledge, or competencies in advance. Not only does such proactive mastery demonstrate initiative and forethought, it is energizing and affords fresh perspectives to a practitioner’s regular work.
- Finally, the process of growing in place is particularly rewarding when CFR officers embrace opportunities to **celebrate big wins as integral members of the larger team**. The lead-up to CFR successes often occurs in the background and requires months of expert and time-intensive

engagement. More often than not, CFR is a long game that requires endurance and persistence. Ignoring or resisting opportunities to publicly celebrate positive outcomes imperils our ability to sustain or expand operational resources, attract the attention of new potential collaborators, and use the revitalizing energy generated by deep job satisfaction to maintain momentum in one's role.

### Mobility within Advancement

Career advancement is different for CFR officers than for colleagues in much of college Advancement and Development, where a tacit understanding often exists about the scaffolding of career experience that leads to continued promotion and success within the field. Career paths often are less predictable or linear for CFR practitioners. In fact, many Advancement colleagues are simply unaware of the complementary elements, similarities, and (yes) differences between the fields of CFR and individual giving, unless they themselves have had direct experience in a CFR role. This lack of exposure can lead to an undervaluing of the competencies and institutional knowledge that CFR officers could bring to another role via career histories that differ from those typically associated with individual giving. In reality, overlaying heightened positional authority on the foundation of LFM competencies required for CFR success is a promising pathway for those interested in learning to lead from the top.

This being the case, it is incumbent upon CFR professionals to understand, demonstrate, and fluently articulate their own value to colleagues and institutional leadership. The following competencies are essential for ongoing CFR success and particularly important for CFR professionals to highlight as translatable competencies when seeking promotion within a division.

- The ability to **identify and cultivate partnerships with the right stakeholders** is the coin of the realm for CFR officers, just as it is for Advancement colleagues focused on individual philanthropy. However, CFR officers practice this skill with a number of different internal and external constituent groups. Whether aimed at solidifying a new partnership with a nonprofit organization to help revitalize the local community or soliciting a biotech firm in support of summer research fellowships, CFR outreach is person-to-person and donor-centric at its core. Furthermore, CFR officers know that the key stakeholders are often the most challenging to engage or even the most commonly overlooked. In bringing these individuals to the discussion table early in a project, CFR staff create stronger ideas and proposals while generating deeper buy-in and goodwill among participants.
- To function at the highest levels, CFR professionals must understand the issues confronting higher education today and how their institutions are positioned to address them. This knowledge of where their institutions can compete most effectively for funding (and where they cannot) requires a finely honed ability to **recognize organizational strengths** relative to peer and aspirant institutions.

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- Understanding an institution’s core programs and strategic plan is an obvious and essential first step for effective CFR practice, followed closely by the ability to **identify connections among institutional priorities**. Organizational funders and, increasingly, individual donors, seek to maximize (and thus require grantees to measure) philanthropic impact through investments that often involve complex collaborations. CFR officers are comfortable in this space, practiced conveners of conversations, and, in some cases, even subject-matter experts with responsibility for a number of different portfolios. Leveraging these connections elevates existing programs and strengthens emerging ones by lending new perspectives.
- It follows logically, then, that practitioners with the keen ability to **see opportunities where others cannot** are institutional assets—in their current roles and when advancing within the institution. This is particularly true when the ability is accompanied by wise judgment, backed by formidable institutional knowledge, and anchored by credibility they have built with campus constituencies over time. Institutionally minded CFR professionals can spotlight pockets of opportunity for collaboration and new programming and highlight “gaps” in institutional practice and policy.

### Pursuing Adjacent Fields

One aspect of CFR work that distinguishes the field from others in Advancement is the variety of constituent groups (both on and off campus) with which practitioners frequently interact. The goal of this paper is not to spur CFR officers out of the field. However, for those seeking new opportunities within or outside the academy, several competencies developed through effective idea generation, relationship building, institutional knowledge, the pursuit of grants and other types of funding, and other core CFR activities should position such professionals for success in adjacent fields. These include the following higher-order competencies:

- Corporate and foundation relations professionals have the **ability to learn quickly and synthesize new information**, then determine what is essential (and what is not) to advance the best ideas. This skill is an asset in quickly learning about new areas.
- CFR professionals also must become remarkably **adaptable** to transition between activities as varied as leading a high-energy corporate CEO through an on-campus site visit with institutional leadership to working closely with a faculty member to craft an extraordinarily detailed proposal focused on Russian medieval art.
- Finally, and perhaps most importantly, highly successful CFR officers demonstrate **intellectual curiosity, flexibility, and the ability to improvise**. These are among the most important traits in modern academia, but they are crucial when branching out and making a career move to an allied profession. Staying nimble, quick, and open to change when learning a new “lane” within

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an institution is critical. Such competencies are invaluable to CFR professionals who take the calculated professional risk to explore adjacent fields.

### Measuring Performance

If one accepts this overview of competencies required for success by CFR officers at various stages of their careers, it follows that performance evaluations should prioritize them accordingly. Metrics related to dollars, numbers of proposals, or portfolio volume can be useful, particularly if appropriately contextualized to account for externalities that may impact the CFR field as a whole in any given period. For many CFR operations, they are unavoidable. However, such metrics are insufficient measures of overall performance. Expanding performance evaluation to appropriately focus on non-financial or more qualitative competencies, such as those detailed earlier, requires adaptation, creativity, and nuance. Although such evaluations (and associated metrics) are necessarily institution- and role-specific, developing better ways to measure CFR performance and progress must begin with a deeper understanding of the role and its complexities—the primary goal of this white paper.

### The Value to Organizations

As discussed previously, CFR professionals occupy a privileged seat on college and university campuses, residing at the nexus of ideas and stakeholders. To accomplish their work, they must create strong

*CFR professionals add value  
where others often don't  
because they see opportunity  
where others won't.*

bridges between internal constituents and then again with the external communities of funders as well as potential program partners and external collaborators. As objectively valuable as these efforts may seem, their potential benefits to the broader institution are at times overlooked or underleveraged in favor of meeting performance goals and department-specific metrics

defined at divisional levels dictated by reporting lines. The competencies highlighted in the previous section, in concert, demonstrate what makes a CFR professional successful in leading from the middle of an organization. When combined and allowed to flourish, they position CFR staff to convey outsized impact and advance institutional change in alignment with the strategic plans of their colleges and universities. How, then, do savvy senior administrators most effectively leverage this distinctive skill set and vantage point for the broader benefit of their organizations?

### Celebrate Difference

For institutions, acknowledging that CFR-oriented skills and competencies bring value above and beyond “dollars in the door” is essential. CFR work differs substantially from that of colleagues in other frontline fundraising roles. Understanding and harnessing these differences for the benefit of the institution will allow insightful leaders to best adapt to the changing nature of institutional philanthropy noted earlier.

CFR professionals add value where others often don't because they see opportunity where others won't. Like all the best fundraisers, they are matchmakers who connect donor (or funder) interests and desires for impact with the institution's priorities and aspirations—as defined by senior leaders. **What separates CFR professionals is the combined knowledge of the broader higher education landscape and funding trends as well as institutional strengths, natural synergies, and potential partners.** They use this information to build coalitions of the right stakeholders, recognizing the need to include more than the usual suspects to generate buy-in across constituent groups and ultimately position projects for long-term sustainability. In so doing, CFR officers are experts at organizational positioning and, if encouraged and supported, effective silo destructors who work across barriers to yield effective collaborations.

A similarly important but often underrecognized component of CFR work is the well-honed ability to demonstrate real and measurable impact to funders. Because they work across the full solicitation cycle, from developing ideas to writing proposals to stewarding gifts and grants, CFR professionals can effectively work with faculty and staff to articulate anticipated outcomes prior to grant submission, and then add layers of qualitative and quantitative data to outcomes reports. They understand how to measure and demonstrate impact in comprehensive ways by engaging offices across the institution in the process. Increasingly, such background in and connections to institutional data are helpful in making the case to the next generation of individual donors as well, contributing to the robust stewardship of those able to make transformational gifts to colleges and universities.

Notably, many of the key differences articulated here are differences of scope or degree rather than differences of kind. They therefore advantageously position CFR professionals to move seamlessly into other areas of Advancement and Development. The heart of CFR work is relationship building—with faculty, staff, institutional leaders, corporate executives, or program officers. The broad set of skills underlying that essential element of the role, combined with the benefit of retaining personnel with deep institutional history and continuity, can make promoting CFR staff into leadership roles a brilliant staffing choice.

### **Connecting Fundraisers to the Academic Enterprise**

In many centralized Advancement divisions, CFR officers serve on the frontline of faculty engagement. For these faculty colleagues, CFR staff members are trusted guides to the grant-seeking process and, many times, the only individuals in Development with whom many faculty have significant contact. Strategic Advancement leaders looking to optimize connections with faculty and co-curricular programs on campus can partner with the CFR team to tap into existing and carefully cultivated relationships.

One avenue for doing so is to invite CFR officers into regular gift strategy discussions with those members of the frontline fundraising team focused on individual philanthropy. This provides an opportunity for both offices to learn about the work of their colleagues, build trust, and share knowledge. Perhaps there is a donor waiting to fund feminist philosophy, but gift officers are not familiar with the faculty members engaged in such scholarship on campus. Maybe the well-vetted but declined grant proposal to enhance

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entrepreneurship on campus is precisely the idea required to spark an alumna's philanthropic investment. Or perhaps a current parent has ties and can open the door to a foundation that CFR staff members have been trying to cultivate for years. Sharing academic content and individual donor knowledge strengthens both teams and enhances collegiality.

CFR officers also tend to know which faculty and staff are superstars when it comes to engaging corporate executives and explaining their niche area to foundation program staff. Many of these same qualities make those teachers and researchers terrific presenters at alumni gatherings and new parent receptions, not to mention strong allies when it comes to speaking positively to their peers about the benefits conferred through collaboration with Advancement. Asking CFR staff to help make introductions to faculty with whom they are already working demonstrates that leaders value their knowledge. It also is likely to connect Advancement leadership with those faculty best positioned to communicate effectively with an educated lay audience about their areas of scholarship and its impact. To sustain this connective pipeline to faculty, CFR officers should, when possible, attend faculty meetings and develop structures to ensure close communication with their institution's deans of research or curriculum, tech transfer leaders, sponsored project professionals, and the respective teams working in each of those areas.

### Conclusion

*The worst-possible outcome in response to changing opportunities and pressures would be failure to adapt, unwillingness to migrate, and allowing this art form to perish.*

The context influencing the work of CFR professionals in higher education today is shifting, and that evolution presents opportunities for both those engaged in this rewarding work and the leaders who supervise them. The goal of this white paper is to position proactive CFR officers and institutional leaders to respond accordingly. Data provided by project participants and discussed herein are a treasure trove for those willing to think creatively about the future of CFR. If focused on the right set of competencies and empowered by institutional leaders seeking new and collaborative ways to advance strategic priorities, CFR professionals can adapt to this new normal

within the sector. As interests or portfolios shift, they are well positioned to migrate into new leadership roles within their division, the broader organization, or adjacent fields. The LFM competencies embodied by expert CFR practitioners are highly valuable yet often underrecognized. The worst-possible outcome in response to changing opportunities and pressures would be failure to adapt, unwillingness to migrate, and allowing this art form to perish.

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### **Personal Communication**

- Nicole Marshall, Director of College Grants & Sponsored Programs, Union College, Summer-Fall 2019.
- Sacha (Alexandra) Patera, PhD, Senior Managing Director, Dartmouth Corporate Relations, Spring 2018; Currently Associate Vice President of the Rutgers Corporate Engagement Center.
- Nancy Scogna, Senior Director of Development and Chief of Staff, University of Virginia Health Foundation, Spring 2018.
- Allison Teweles, Assistant Dean for Corporate & Foundation Relations, McIntire School of Commerce, University of Virginia, Spring 2018.



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3. If you were to make the case for the ROI for your position but could not use financial measures what indicators would you highlight?



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**Part 2: Model New Job Description**

**MODEL POSITION DESCRIPTION**

Some College or University  
Full-Time, Exempt Position Description

Position Title

Director of Strategic Connections and Innovation

-or-

Director of Institutional Partnerships and Strategic Funding

Position Summary

The director is primarily charged with building relationships with internal and external stakeholders to support the grant-seeking function of the institution. The director will be a creative and strategic thinker who will contribute to a culture of innovation on campus by bringing faculty, staff, students, and community partners together to generate ideas that leverage institutional strengths. Drawing upon deep knowledge of the College, the funding landscape, and trends in higher education, the director will work collaboratively to develop and articulate compelling funding opportunities, energetically pursuing funding and partnerships that support the College's highest ambitions.

Primary Responsibilities

Essential Functions

- Promote cross-campus partnerships and interdisciplinary collaborations
- Prepare and submit proposals seeking external funding
- Coordinate, manage, and advance existing relationships with external funding partners
- Develop new philanthropic partnerships with corporations, foundations, and allied organizations
- Convene working groups for institutional priorities
- Steward funds awarded and communicate impact
- Connect campus programs with potential funding partners

Additional Functions

- Disseminate funding opportunities to the campus community
- Develop symbiotic relationships in the local community
- Deepen corporate and foundation partnerships with the goal of promoting connections across the institution as a whole, including engagement beyond traditional philanthropy
- Host site visits for corporate and foundation partners
- Serve as the policy and regulations expert in this realm
- Facilitate faculty interaction with Development, serving as liaison among the departments

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### Desired Competencies

- Intellectual curiosity
- Relationship management
- Excellent writer and storyteller
- Command of core CFR mechanics
- Project development and management
- Patience
- Reliability
- Institutional knowledge
- Collaborative skills
- Sense of humor
- Creative and strategic thinker
- Flexibility
- Persistence
- Optimistic “can-do” mindset

### Reporting Relationships

The director will report to the Office of the Provost, with a dotted line to the Vice President for Advancement and/or Vice President for Research (when applicable). The incumbent will be required to maintain positive and productive working relationships with colleagues in both divisions and across campus.

### Key Relationships: Institutional Offices and External Contacts

- President and President’s Cabinet members (including Provost and Vice Presidents)
- Academic Leadership (Deans, Assistant/Associate Deans, and Department Chairs)
- Advancement
- Institutional Research
- Career Services and Employer Relations
- Communications
- Research Office
- Intellectual Property and Technology Transfer
- Local and Non-Profit Leaders
- Foundation Leadership, Program Officers, and Staff
- Corporate Leadership, Philanthropy/Engagement Officers, and Recruiting Partners