

If it's not in The Raiser's Edge, then it simply did not happen.

THE UNIVERSITY OF ARIZONA FOUNDATION

A Cultural Change, nothing less

- ◆ “We are spending how much?!?!”
- ◆ “**You** better make sure this works, or you can tell the Board”

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"Are you certain this is a good idea?  
I don't want to take credit for something idiotic."

Leo Cullum for Barron's

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## A Cultural Change, cont.

- ◆ You need a mantra and a prophet to accomplish change.
- ◆ The software raises no money, but the way you animate its use offers great opportunity.
- ◆ Blend the science of informatics with the art of relationship building.
- ◆ We are providing an enterprise solution to further the interests of our institution, for and from every corner of the campus.
- ◆ We seek to gather, store, retrieve, analyze, and ACT upon those things that bind individuals and the organizations they create to our institution.
- ◆ SIMPLE



## Three Fundamentals to Success

- ◆ In higher education advancement, these facets must be present to assure success:
  - Engaged Academic Leadership
  - Clarity of Purpose
  - Create a Culture of Philanthropy
- ◆ The challenge is to incorporate these realities of success into your operational truth.
- ◆ Assure that our daily tasks are guided by the truths of our business
- ◆ Not so simple!



## Engaged Academic Leadership

- ◆ Faculty, students, and their leaders are a nearly infinite source of inspiration.
- ◆ Daily they expand the frontiers of human knowledge.
- ◆ Yet, if the leadership will not make time to share the light, no connection to the surrounding community, writ large, is possible.
- ◆ Inspiration without visceral bonding to aspiration is meaningless.
- ◆ "If you put no effort into the endeavor, you will get nothing in return."
- ◆ Use self-interest, initially, to tempt them into the process. With success a taste will develop and an understanding of the need for effort is now internally forthcoming.
- ◆ It's a beautiful thing.



## Clarity of Purpose

- ◆ To discover, educate, serve, and inspire
- ◆ Toward a cancer-free generation
- ◆ Excellence is our only pursuit
- ◆ Concise, readily understood and ideally passionate



## Culture of Philanthropy

- ◆ Initially difficult, but unstoppable once started.
- ◆ Scalable
- ◆ Placing the interests of another before your own.
- ◆ All that is needed may be learned in Sunday School.
  - Do unto others as you would have them do unto you
  - Give to receive
  - Make someone happy each and every day
  - Simple, but not easy!
- ◆ Saving or changing lives, so straightforward
- ◆ The passage of ships
  - Friendship
  - Relationship
  - Partnership
  - Kinship
  - Always act in such a way that the next ship may be reached.



## Culture of Philanthropy, cont.

- ◆ Be aware that those attributes that make faculty rise through the ranks have little value in our efforts.
- ◆ The invulnerable super person must now have enough trust and faith to show how others may assist.
- ◆ Will they tear open their chests and allow another to hold their hearts?
- ◆ They must or the passage of ships will cease
- ◆ Involve, educate, and engage the aspirants, so that they may anticipate the goals and help define them.
- ◆ It's a full contact sport that demands connection
- ◆ Believe, invest, and encourage others; ideally a perpetual cycle logically resulting from a consistent and considered effort to include others in our passion.

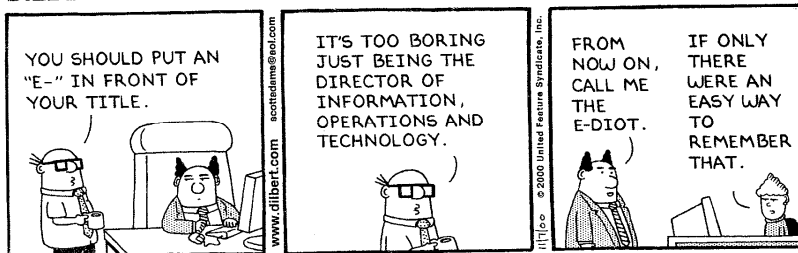


## Culture of Philanthropy, cont.

- ◆ We share stories
  - A family genetically predisposed to give
  - Tireless effort, “Dead-dog Dildine”
  - Mrs. B’s annual token of remembrance
  - Changing a tire
  - From dropout to enabler of 22<sup>nd</sup>-century science
  - Mr. Z’s determination to foster health and wellness
- ◆ Our true currency is passion and shared resolve
  - Don’t be misguided or blinded by the proxies
  - Whenever in doubt follow the passion, not the money



## DILBERT / Scott Adams





## Building Your System

- ◆ The tools are our repository, the vault.
- ◆ What must I know in order to capture the drama and beauty of an act of philanthropy?
- ◆ COLLECT THAT INFORMATION!!!!
- ◆ It is NOT 0's and 1's, but recording the intentions and aspirations of people who seek to change or save lives.
- ◆ Record the story behind each gift in order to best plan for the next gift.
- ◆ When aligned with your intentions, the Blackbaud tools will allow for integration of effort, so that all may directly and easily benefit from the most effective practices and strategies that succeed.

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## Building Your System, cont.

- ◆ Increased institutional effectiveness resulting from the fabrication of business rules derived from your philosophies
- ◆ Limited, of course, by the boundaries created by the IRS and various legislative bodies.
- ◆ Leave the place of anecdotes and accidental generosity, and join a world of purpose-driven thoughtful engagement leading to acts of generosity one could not imagine without the involvement of your constituents.

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## Building Your System, cont.

- ◆ Examples of Guided Business Processes
  - Distributed Gift Processing (Cash Gifts)
  - Generating Tax Receipts
  - Generating Division-specific gift acknowledgements
  - Processing Pledges
  - Processing Payroll Deduction
  - Generating Pledge Reminders
  - Adjusting Gifts
  - Posting Gifts



## Building Your System, cont.

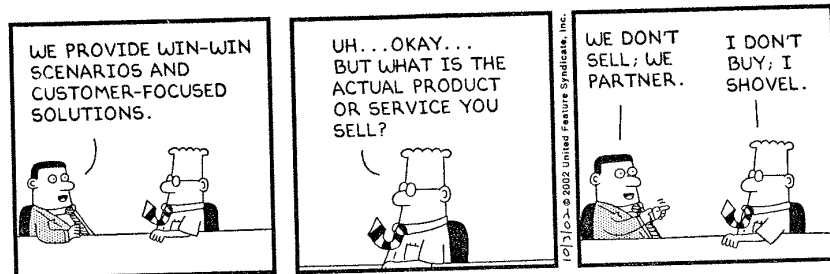
- ◆ Guided Improvements
  - Distributed Gift Entry
  - Linking of Gift to specific GL Account Number
  - Produce reports required by Development staff and auditors
    - Having standard reports and Dashboards available will increase the speed and frequency with which end users can receive information.
    - **Business Intelligence** will vastly improve reporting functionality
  - Produce all donor letters/correspondence directly from database using Microsoft Word
    - Donor acknowledgement letters, tax receipts, and other correspondence, will be produced directly from **The Raiser's Edge**
    - In addition, changes to letters can easily and quickly be made within the system





## The Big Finish

- ◆ Be mindful of the words of Jim Collins & Jerry Porras from "Built to Last:"
  - "The essence of a visionary [organization] comes in the translation of its core ideology and its own unique drive for progress into the very fabric of the organization—into goals, strategies, tactics, policies, cultural practices, management behaviors, building layouts, pay systems, accounting systems, job design—into *everything* that the [organization] does."
- ◆ **"If it's not in The Raiser's Edge, it simply did not happen"**
- ◆ We developed a secondary motto – "It's the end of the world as we know it, and we all feel fine." Most fervent apologies to R.E.M. who deserve better.





## Truly the End

- ◆ With profound and inadequate thanks to my buddies at the UA Foundation:
  - Jim Moore
  - Bryan Rowland
  - Ken Dildine
  - Mark Harlan
  - John Detloff
  - Keith Wilburn
  - Mary Stein
  - Kathy Adkins
  - Craig Haubrich



## Truly the End, cont.

- ◆ With heartfelt appreciation for enduring my unreasonable demands and fits of pique to the Blackbaud Team:
  - John Marsh, Master Conversionist
  - Jim Innis
  - Kevin Knight
  - Richard Geiger
  - Louisiana Lighting & the Project Team
  - Ken Keefer
  - Marc Chardon



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**There is life after conversion, you just need to leave town!**