University System of Maryland

**Board of Regents**

Summary of Item for Action, Information or Discussion

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**TOPIC**: Presentation by Bill McGoldrick

**COMMITTEE**: Advancement Committee

**DATE OF MEETING**: February 8, 2017

**SUMMARY**: Mr. McGoldrick will give a presentation and lead a discussion regarding capital campaign readiness and board leadership's role in successful philanthropy.

**ALTERNATIVE(S)**: This is an information item.

**FISCAL IMPACT**: This is an information item.

**CHANCELLOR'S RECOMMENDATION**: This is an information item.

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COMMITTEE ACTION: DATE:

BOARD ACTION: DATE:

SUBMITTED BY: Leonard Raley, Vice Chancellor for Advancement, raley@usmd.edu
301-445-1941

WASHBURN & MCGOLDRICK, LLC

950 New Loudon Road • Suite 210 • Latham, New York 12110 • Telephone 518.783.1949 • Fax 518.783.4001

*Building Relationships to Advance Education and Philanthropy*

# WILLIAM P. MCGOLDRICK

Since 1971, Bill McGoldrick has built a reputation as a successful professional and an outstanding teacher, speaker and consultant. His skills, experience and passion for education led him to join Sue Washburn to establish WASHBURN & MCGOLDRICK in 1995 after 25 years as a campus-based advancement professional.

Bill has consulted at many of the finest universities in the United States, United Kingdom, Europe, Canada and Australia, providing strategic advice; board, volunteer and staff training; campaign planning and counsel; campaign readiness studies; advancement program planning and assessment; retreat facilitation; and alumni relations and communications program reviews.

Bill served Rensselaer Polytechnic Institute as Director of Development for five years and as Vice President for eleven years leading the alumni relations, communications and development programs, and two campaigns that secured more than $260 million. He was also major gift director at The College of William and Mary, and public relations director at SUNY Oswego and at Harrisburg (PA) Area Community College.

He has been active regionally, nationally and internationally with the Council for Advancement and Support of Education (CASE) and served on CASE's Board of Trustees. He has been a faculty member at many professional development programs sponsored by CASE and the Association of Governing Boards. He has been a faculty member at CASE's flagship educational fund raising conferences at Dartmouth College, the University of Durham in England and the University of Melbourne in Australia.

Bill earned a bachelor's degree from Siena College and a master's degree from Syracuse University. He served two years as Public Affairs Officer in the United States Navy.

He is active as a board member for various community organizations. He has served as a member of the Board of Directors of the Siena College Alumni Association and Siena College's Board of Associate Trustees.

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# PHILOSOPHY OF SERVICE

WASHBURN & MCGOLDRICK, LLC helps colleges, universities and independent schools successfully seek philanthropic support and create lasting relationships. Founded twenty years ago by Sue Washburn and Bill McGoldrick, our consultants are leaders in education, focusing on strategic planning, philanthropic relationships, campaign planning and execution, marketing and external relations, and issues of institutional leadership, trusteeship and governance.

We want to share with you the values and principles, programs and practices that we have developed during our years of professional service to education. They made us successful campus professionals and now guide our approach to consulting. These concepts, tailored to meet your needs, can help you succeed too.

The power of our service is results. In an increasingly competitive and highly challenging environment for education, we are committed to helping you design and adapt programs built upon a foundation of clear communications and knowledgeable data analysis. We employ critical thinking, planning and collaboration as the basis for the strategies we help you develop. We bring our knowledge and practical experience as leaders, managers and teachers to help you in strategic planning, development, alumni and donor relations, marketing, and board, staff and volunteer development.

In partnership with you, we define problems and opportunities, develop written plans and critical paths, determine metrics and milestones, and focus on bottom line results. We offer specific analytical thinking and imaginative, non-mechanical response to each assignment. We work collaboratively with you and your colleagues to determine the best plan for your institution and then work with you to implement that plan. We help you make mid-course corrections and to deal with leadership transitions and unexpected circumstances.

Our services include:

- Creative counsel to institutional leadership in board development, institutional planning and priorities, campaign strategy and advancement program strategy
- Facilitation of board and staff planning retreats
- Special support and counsel for presidents, chancellors and heads
- Management review and assessment of your institutional advancement program
- Campaign counsel and campaign feasibility studies
- Critical paths for campaign planning
- Creation of specific action plans for each advancement area
- Formulation of communication strategies and programs for key constituencies
- Principal and major gift strategy and program development
- Strategies for annual and special giving programs
- Educational and training programs for trustees, volunteers, faculty and staff

We believe that advancement must be a fun and rewarding process for everyone involved. We are responsive and provocative, challenging and candid, accessible and proactive. We treat all our clients with the same care and respect we treated our donors and colleagues when we were campus officers - with a commitment to service, partnership, stewardship and long-term relationships – to lead to new and higher levels of philanthropic support. In short, we add great value to your team and help you succeed.

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## PLANNED GIVING SERVICES

Planned giving has become an integral component of every successful development effort, often accounting for 15% to 40% of a campaign total. By educating donors about the tax and income benefits, planned giving can often motivate benefactors to give more than they previously thought possible. Because of its significant benefits, it is important to integrate planned giving into the overall development program.

We understand, however, that to add a new planned giving program or to enhance an existing one is challenging. We provide strategic advice to mature programs and, when no staff person works exclusively on planned giving, we can help develop ways to incorporate planned giving into your existing program. Depending upon your institutional needs and personnel, we can help your planned giving efforts by focusing on doable, concrete steps.

Through strategic planning, an exciting education program and accessible marketing, we can help you develop the infrastructure and ongoing outreach to make your planned giving program strong and successful. The key is consistency and clarity. By helping your benefactors simultaneously fulfill their financial goals and support your institution, you will strengthen donor relationships and close more gifts.

We can energize your planned giving program by helping you:

- Develop a strategic plan for planned giving that describes the necessary steps to start or grow the program.
- Present customized, "user friendly," engaging planned giving seminars to excite your constituency and to train your staff. Possible audiences include the development staff, trustees, older alumni, faculty emeriti, young alumni, alumnae and women donors, and alumni leadership volunteers.
- Create a planned giving marketing plan that will interest and entice your donors with the financial and philanthropic benefits of deferred giving. We will focus special attention on niche marketing for specific audiences using newsletters, brochures, your alumni magazine, and your development web pages.
- Write understandable planned giving proposals for donors. Confer with donors or their advisors as you work to close the gift.
- Develop or strengthen the planned giving recognition society to help steward, cultivate and identify current and potential planned giving donors.
- Build an efficient infrastructure necessary to support planned giving operations such as gift recognition and acceptance policies, investment management and administration of planned giving assets, etc. The goal is to help you spend more time with your donors and less time on paperwork.

Our one-day ***Intensives***™ programs on "Financial Literacy and Donor Life Stages" and "Planned Giving Essentials" will provide new skills and energy to every Planned Giving and Major Gift team.

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# *INTENSIVES™*

Professional development of staff has become a critical challenge for every institution.

***Intensives™*** is a curriculum of customized, highly effective professional development workshops and seminars that will dramatically increase gift officers' knowledge, confidence and effectiveness.

Our workshops and seminars include:

**Creating Major Gift Success I**
This 1.5 day workshop focuses on essential skills, including donor motivation, understanding wealth, prospect management, language skills, time management, getting appointments, prospect engagement and gift solicitation and closing, and stewardship strategies.

**Creating Major Gift Success II (Pre-Requisite: Creating Major Gift Success I)**
This one-day workshop refreshes solicitation skills and provides additional opportunities to develop increasingly sophisticated prospect strategies, build fluency in addressing donor questions, and improve confidence in soliciting gifts.

**Managing Up, Down and Across**
This workshop for those with management and fundraising responsibilities focuses on setting team and individual goals and monitoring progress, dealing more effectively with challenging team members and cross-campus partners, motivating academic and administrative leaders to focus on fundraising priorities, and time management.

**Financial Fluency and Donor Life Stages**
This one-day workshop with two complimentary half day sessions, helps gift officers understand donor investment, retirement and estate planning goals, and how these goals may influence philanthropic decisions. In the Life Stages session, gift officers learn to identify and understand the financial, social, and personal decisions donors face at different ages with attention to designing specific gift arrangements that can help donors address those issues while helping your institution meet its philanthropic goals.

**Planned Gift Essentials**
This one-day workshop will help every gift officer understand the basic language of planned giving, the different planned giving instruments that will help donors expand their philanthropic capacity, and the stages of life when donors are most likely to receive information about planned giving. It will also address how to organize and market a planned giving program successfully and how to integrate the program into the fabric of the institutional development program.

We are always developing new workshops and are also prepared to work with you and your team to design and develop custom interactive workshops and seminars on topics pertinent to your institutional and team needs.