



# HIGHER ED IMPACT

## MONTHLYDIAGNOSTIC

August 2012

# Funding Campus Priorities: A Whole- Campus Effort



## HIGHER ED IMPACT

Delivered free to your inbox, *Higher Ed Impact* provides you with a full tool kit to help you monitor and assess the trends and strategic challenges likely to have an impact on your institution's health and competitiveness.



### DAILY PULSE

Scan current events, timely research, and notable practices at other institutions.



### WEEKLY SCAN

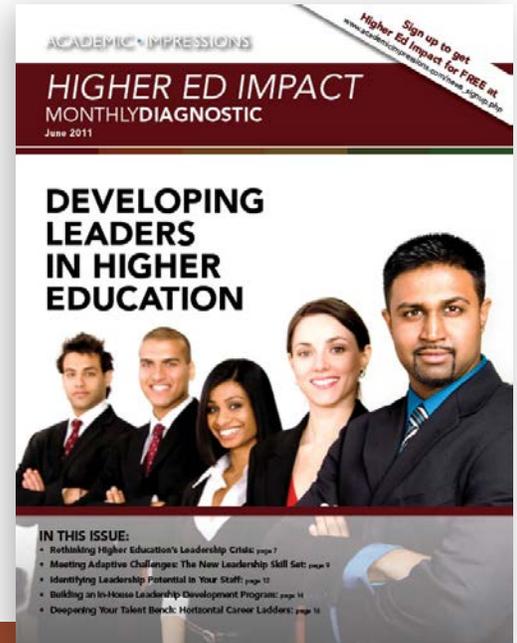
Review the week's most significant events and the most timely research in higher education, with key takeaways suggested by higher education's leading experts.



### MONTHLY DIAGNOSTIC

Get an enterprise-wide and in-depth look at a current, strategic challenge; identify steps to take and critical questions to address.

Learn more or sign up to receive *Higher Ed Impact* at: <http://www.academicimpressions.com/news-publications>



## ABOUT ACADEMIC IMPRESSIONS

We are an organization that exclusively serves higher education professionals. We offer focused and intentionally crafted learning experiences to help you address your most pressing challenges.

Our work addresses a range of issues related to student recruitment and retention, faculty support and development, alumni engagement and development, and increasing organizational productivity.

Learn more at [www.academicimpressions.com](http://www.academicimpressions.com).

Copyright © 2012 CR Mrig Company. All Rights Reserved. | 4601 DTC Blvd., Ste. 800, Denver, CO 80237

## A LETTER FROM AMIT MRIG PRESIDENT, ACADEMIC IMPRESSIONS

---

As the higher education landscape becomes increasingly competitive, and as both the challenges and the opportunities facing your institution become increasingly complex, it's critical that the goal-setting and the work of raising funds to finance the pursuit of your institution's mission become an enterprise-wide endeavor, not just a function of the development office.

The more that the whole campus takes ownership for the campaign, the more effective the campaign is likely to be — not only in raising funds, but in building stronger and more committed donor relationships and ensuring that the most critical priorities of the institution are those that see funding.

We asked an academic dean, a provost, several lead fundraising and campaigns consultants, and a head advancement officer to offer their insights. We hope their advice will be useful to you.



### **MONTHLY DIAGNOSTIC ONLINE**

Download this PDF and read this issue's articles online:

<http://www.academicimpressions.com/news/funding-campus-priorities-whole-campus-effort>

# AI Contributors



## **Amit Mrig**

### **PRESIDENT, ACADEMIC IMPRESSIONS**

Amit co-founded Academic Impressions in 2002 to provide a variety of educational products and services that help higher education administrators tackle key, strategic challenges. Since 2002, AI has designed and directed hundreds of conferences and has served representatives from over 3,500 higher education institutions. Besides designing and leading events for cabinet-level officers focused on strategic planning, budgeting, and leadership development, Amit leads Academic Impressions' ongoing research into the five- and 10 year challenges facing higher education and plays a lead role in outlining each issue of *Higher Ed Impact: Monthly Diagnostic* to highlight how college and university leaders can take an institution-wide approach to answering those challenges.



## **Daniel Fusch**

### **DIRECTOR OF RESEARCH AND PUBLICATIONS, ACADEMIC IMPRESSIONS**

At Academic Impressions, Daniel provides strategic direction and content for AI's electronic publication *Higher Ed Impact*, including market research and interviews with leading subject matter experts on critical issues. Since the publication's launch in 2009, Daniel has written more than 250 articles on strategic issues ranging from student recruitment and retention to development and capital planning. Daniel previously served as a conference director for Academic Impressions, developing training programs focused on issues related to campus sustainability, capital planning, and facilities management. Prior to joining Academic Impressions, Daniel served as adjunct faculty for the University of Denver. Daniel holds a Ph.D. in English.



## **Courtney Gulden**

### **CONFERENCE DIRECTOR, ACADEMIC IMPRESSIONS**

Courtney is responsible for creating online and in-person conferences in the area of advancement, including needs research, program design, and subject matter expert recruitment. Her focus within advancement is targeted at alumni relations, annual giving, social media, and development communications. Courtney has been with Academic Impressions since 2008, and is currently writing her dissertation on the story of Samson and Delilah. She has taught several courses on subjects such as apocalyptic literature and translation theory and was a Teagle-Wabash Teaching and Learning Fellow at The Graduate Theological Union in Berkeley, CA, where she honed her practical teaching skills and curriculum design capability with a mentor professor for one academic year. She is an occasional giver to her alma mater, Colgate University, and is a Federal Club Member of HRC Colorado.

# Contributors



**Bruce Flessner**

PRINCIPAL, BENTZ WHALEY FLESSNER

Bruce is a founding partner of BWF and has spent his entire career in development. He began his career as the annual fund director at Kalamazoo College and served as a vice president for the University of Minnesota Foundation until forming BWF in 1983. Since then, Bruce has consulted for hundreds of major clients, including the American University in Cairo, Brown University, the Mayo Clinic, Purdue University, the University of Illinois Foundation, and the University of North Carolina System. He is a recognized expert on new-wealth philanthropy and has been widely quoted across national media. Bruce has served on the board of the Council on Foundation's New Ventures in Philanthropy and as a team member for the Kresge Foundation national initiative for community foundations.



**Chester L. Gillis, Ph.D.**

DEAN, GEORGETOWN COLLEGE, GEORGETOWN UNIVERSITY

Appointed dean in April 2009, Chet previously served Georgetown as chair of the Department of Theology, then as interim dean. He is an expert on the U.S. Catholic Church, the history of Catholicism, the papacy, interfaith dialogue, and religious pluralism. Chet received the Excellence in Teaching Award from the Liberal Studies Program in 2005, and, as a member of the American Theological Society, he served on the Academic Relations Task Force of the American Academy of Religion.

Chet previously chaired the Arts and Humanities Committee for the Heinz Awards and the national Teaching Award Committee for the Association of Graduate Liberal Studies. He is co-editor of the Columbia University series Religion and Politics and past editorial board member of *Confluence: Journal of Graduate Liberal Studies*. Frequently consulted by the media about contemporary issues in religion, Chet has appeared on *Face the Nation*, *Meet the Press*, *The News Hour*, *Good Morning America*, *Nightline*, and *National Public Radio*, among other outlets. He is also a contributor to the *Washington Post/Newsweek* website *On Faith*.



**Christopher S. Groff**

EXECUTIVE DIRECTOR, CORPORATE AND FOUNDATION RELATIONS,  
FAIRLEIGH DICKINSON UNIVERSITY

Chris manages the CFR philanthropic planning, research, and stewardship process for all three of Fairleigh Dickinson's campuses. His work and leadership has successfully led to an increase of corporate fundraising dollars at FDU since the 2008 financial collapse. Chris previously specialized in external relations in finance, economic development, and public policy as a director of corporate and foundation relations at Rutgers, The State University of New Jersey. A frequent regional and national speaker, Chris is also a lecturer in communications.



**David P. Jones**

**ASSOCIATE VICE PRESIDENT FOR STUDENT AFFAIRS AND ENROLLMENT MANAGEMENT, MINNESOTA STATE UNIVERSITY, MANKATO**

David Jones is the chief student affairs officer responsible for managing enrollment growth and providing excellent student services including campus housing, campus recreation, student health, student union, campus security, and admissions. Prior to joining MSU, Mankato, David led one of the fastest-growing campus housing systems in the country, having constructed nine residence halls housing over 3,400 students in the past six years that totaled 300 million in capital bonds. With more than 19 years of housing experience, he has been an active leader in the housing field as a past president of the Southeastern Association of Housing Officers, committee member with the Association of College and University Housing-Assessment Committee, and an editorial board member of The Journal of College and University Student Housing. He is currently a reviewer for the Journal of First-Year Students and Students in Transition, and an editor for the new Journal of Learning Spaces.



**Mark Jones**

**VICE PRESIDENT, EXTERNAL RELATIONS, HOLLINS UNIVERSITY**

A seasoned leader in liberal arts college advancement, Mark recently joined Hollins University after leading advancement programs and directing campaigns at three other distinguished small colleges, including a \$48 million effort at Goucher, a \$136 million campaign at Wabash, and an \$80 million initiative at St. Norbert. He also served previously at the University of Virginia as director of corporate relations and later as executive director of the Virginia Engineering Foundation. Mark has offered assessment, planning, and training services to many nonprofit groups, as well as interim leadership for organizations such as Muhlenberg College and the Green Bay Botanical Garden. He has authored several articles for publication in professional journals and magazines.



**James M. Langley**

**FOUNDER AND PRESIDENT, LANGLEY INNOVATIONS**

Before forming his own comprehensive advancement consulting firm, Jim served as vice president for advancement at Georgetown University, leading the institution to record numbers in new commitments and cash despite a difficult economy and launched a number of innovative programs, including the Student Discovery Initiative. He previously spent eight years as the vice president for advancement at the University of California, San Diego. At UCSD, Jim led the planning and execution of the institution's seven-year, \$1 billion campaign, then raised almost half the target amount in three years, despite a weak economy. Operations under his management have won awards in virtually every area of university advancement.



**Gene Luna**

ASSOCIATE VICE PRESIDENT FOR STUDENT AFFAIRS, DIRECTOR OF STUDENT DEVELOPMENT AND UNIVERSITY HOUSING; CLINICAL ASSOCIATE PROFESSOR – HIGHER EDUCATION ADMINISTRATION GRADUATE PROGRAM, UNIVERSITY OF SOUTH CAROLINA

Dr. Luna currently serves as associate vice president for student affairs and academic support at the University of South Carolina. He also holds a clinical faculty appointment in the College of Education and teaches in the higher education and student affairs administration graduate programs. Gene has direct responsibility for the student success center and early intervention programs, housing and residence education, student conduct, academic integrity, national student exchange, student health center, counseling center, student disability services, sexual health and violence prevention, student engagement, and a campus initiative to promote health and wellness called Healthy Carolina. He has been extensively involved with the redesign of the general education requirements for students and was co-author of a proposal adopted as the university's Quality Enhancement Program within its recent SACS re-accreditation. Gene has published more than 30 articles and recently edited a monograph titled Learning Initiatives in the Residential Environment. tactical planning, sustainable development, and adapting digital technologies to enable more effective facilities planning and design.



**Santa Ono**

SENIOR VICE PRESIDENT FOR ACADEMIC AFFAIRS AND UNIVERSITY PROVOST, UNIVERSITY OF CINCINNATI

Santa Ono co-chairs the University of Cincinnati's steering campaign for its capital campaign. He also serves as professor of pediatrics within the College of Medicine and professor of biology in the McMicken College of Arts and Sciences. Prior to his move to UC, Dr. Ono served as vice provost for academic initiatives and deputy to the provost and then senior vice provost for undergraduate academic affairs at Emory University. Dr. Ono has served on the editorial boards of the Journal of Immunology, Journal of Biological Chemistry, Immunology, and the Journal of Allergy and Clinical Immunology. He is a recipient of the Brit Katz Award from Emory University, the Roche Award, the Pharmacia International Award in Allergy Research, and the Medal in Bronze from Osaka City University.

# CONTENTS

---

**A Whole-Campus Effort: Why the Campaign Matters to You** 9

---

**Collaborative Planning for the Campaign** 13

---

**Supporting the Work of the Campaign** 17

---

**Local Business and Community Leaders and Your Campaign** 24

---

# Funding Campus Priorities: A Whole-Campus Effort



## A WHOLE-CAMPUS EFFORT: WHY THE CAMPAIGN MATTERS TO YOU

You may not be a development officer at your institution; you may be an academic dean, an enrollment manager, a facilities manager, a faculty member ... but it is critical that you have a voice and some ownership in the fundraising campaign, if the campaign is to be successful in funding your unit's efforts in pursuit of the institution's mission.

We asked provosts, deans, fundraisers, consultants, and others for their perspective on why leaders throughout the institution need to be involved in providing input to the campaign plan and its execution — and why this involvement matters. Unanimously, these experts asserted that the more proactive and constructive your involvement in the campaign, the more value the campaign will be able to bring both to your unit and to the institution.

## IF YOU'RE INVOLVED, YOUR UNIT WILL BE MORE SUCCESSFUL

If I can't bring resources to the table, I probably am not doing the job I was hired for, and my college will probably be far less successful than it could be. I run the academic enterprise, but the academic enterprise requires a constant input of new resources. Without those resources, we can't be creative and innovative and cutting-edge.

**Chet Gillis, Dean of Georgetown College,  
Georgetown University**

Santa Ono, provost at the University of Cincinnati, makes a similar argument for the provost's involvement, noting the importance of ensuring that academic priorities are clearly reflected in fundraising priorities.

Jim Langley, president of Langley Innovations, adds, "If you aren't an active voice in the planning and implementation of the campaign, then you have lost an opportunity to ensure from the start that the real needs of your institution are going to be met. You will be left in the unfortunate position of receiving funds for projects that are not a priority for your unit, and lacking funds for projects that are high priority. You want to take an active role to ensure that at the end of the campaign, your unit is richer not only financially but in terms of your capacity to deliver the curriculum or otherwise serve the mission of your institution."

Involvement is critical for non-academic, administrative leaders as well. Take the example of the facilities manager. It is increasingly difficult to secure funds for improvements to the physical campus, and in the case of private support, when development officers present donors with a variety of choices, donors naturally gravitate toward committing funds to help people (e.g., scholarships, endowed chairs) rather than to raise buildings. Though we still speak of "capital" campaigns, most campaign-raised funds do not go toward capital projects.

However, if the facilities manager takes a proactive role in talking with potential donors about what these buildings will make possible — if the facilities manager can articulate how investing in a particular building represents an investment in people — then the facilities manager can realize opportunities to raise more money to fund capital and even operations and maintenance needs. "Show the long-term impact," Langley suggests. "Talk about the skills that students can learn because they will have this advanced laboratory. Talk about the physical structures that will be needed to make this possible, and what it will cost to maintain them."

## IF YOU'RE INVOLVED, THE CAMPAIGN WILL BE MORE SUCCESSFUL

It is a truism that ultimately, donors don't want to talk with gift officers. The donor wants to hear from the students who will benefit from the gift, from the faculty who will use the gift to transform students' live or complete cutting-edge research, from the deans who can describe a vision for what their colleges will achieve in the future, and from the administrative and financial officers who can assure them that their gift will be used wisely. The involvement of each of these internal stakeholders is critical to the institution's ability to secure the new resources that will make it possible to serve the institution's mission with excellence.





Let's take the example of the chief financial officer. Langley notes that the discerning, high-end donor wants to know that his or her philanthropic contribution is value added — in short, that their gift is not being used to fill a deficit. “They want to hear from the CFO about how the institution has tightened its belt and focused its priorities. They want to know that their investment is not being poured into a leaky bucket. For example, financial aid: if your institution is raising tuition each year and creating more demand for financial aid, the donor will wonder how much of a real difference their endowment of a scholarship is actually making. The CFO needs to tell the story of the efficiency and cost containment that will ensure that the donor's gift helps the institution move from good to great.” Without that story, the donor may be more reticent to give.

“Similarly, if I am a donor investing in capital improvements,” Langley adds, “I want to know that my dollars are going farther because there is forethought and intentionality behind creating the physical campus of the future. I want to hear from the facilities manager. I want to hear how this person will make the facilities as green, as functional, as self-sustaining, as creative, and as conducive to new learning and research opportunities as possible. I want to see the passion in his or her eyes; I want to know that I am investing in good work.”

What about the academic deans? Chet Gillis, who leads the college of arts and sciences at Georgetown University, suggests that academic leaders need to take a proactive role in the work of securing funds for their colleges. Recognizing the critical role that gift officers play in funding the priorities of your college, Gillis advocates for not only involving yourself in the work of cultivating relationships with potential donors but also doing everything you can to educate the institution's fundraisers about the academic enterprise and its aspirations.

For example, Gillis recommends that deans:

- Invite development officers to staff retreats for associate deans or department chairs: “I want the development officers to know what we discuss and what's important to us”
- Serve as a keynote speaker for a development staff retreat: “I can speak about my priorities, why those are my priorities, how these priorities work, what this college needs, and how I hope they can help — they need to hear that from the dean”
- If employees of your institution receive tuition benefits, work proactively to invite your institution's fundraisers into the classroom, where they can interact with professors and experience the institution from a student's point of view
- Be available to the development officers and ensure that, even amid a tight schedule, they have priority access to you; hold regular meetings with development officers to strategize about potential donor relationships and fundraising opportunities

The more that I can invite the fundraising professionals into the academic enterprise so that they can understand what we do and why we do it, the more successful the campaign will be, the better informed they will be, and the more persuasive they will be on the road ... and the better funded my departments will be.

**Chet Gillis, Georgetown University**

## IF YOU'RE INVOLVED, THE INSTITUTION WILL BE MORE SUCCESSFUL

The reality is that state appropriations are not going to keep pace with the costs of higher education and, for both public and private institutions, continuing to raise tuition and placing more of the financial burden on the student is not a sustainable solution. In our recent Monthly Diagnostic edition "[Setting and Funding Priorities for Your Division: Making the Tough Decisions](#)," we discussed the necessity (and the complexity) of rigorous prioritization to ensure that each division of the institution is spending its limited funds on those items that are most important to their mission.

While strategic allocation of existing resources is a critical step, there is no question that fundraising — for both privates and publics — is going to be of increasing importance as your institution strives to compete and excel in the years ahead.

A lot of institutions now say that "everyone's job is admissions" or "everyone's job is retention." But everyone's job is alumni relations and development, as well. Everyone at some point will be the face of the institution — to someone.

**Mark Jones, Vice President of External Relations, Hollins University**



## COLLABORATIVE PLANNING FOR THE CAMPAIGN

The previous article made the point that a whole-campus campaign leads to a successful campaign. It follows that the campaign planning or steering needs to seek input from the whole campus, as well as external stakeholders (business leaders and key donors). If the campaign goals are set in a conversation that only involves a few people, the campaign will run several risks:

- The campaign priorities may not accurately reflect the actual needs and priorities of the academic enterprise
- Limited campus input during the planning may lead to limited campus involvement during the execution of the campaign (as the campus will feel little ownership of it)
- Limited donor input during the planning may lead to a one-sidedness in later conversations with donors (as campus representatives approach donors with projects to fund, in which donors themselves feel little investment)

It is critical to structure the committee and the planning process in a way that invites input and engagement from a broad range of stakeholders.

### CO-CHAIRING THE COMMITTEE

Santa Ono is a strong advocate for the provost taking a lead role on the campaign planning committee. In fact, at the University of Cincinnati, which is in the late stages of its very successful \$1 billion Proudly Cincinnati campaign, the provost and the vice president of advancement serve as co-chairs of that committee.

The provost has a key role to play for two reasons:

- The provost is in the best position to articulate the institution's academic priorities and academic needs, and to ensure that these directly inform campaign priorities
- The provost is the line manager for the academic deans, and can work with deans to set achievable targets for fundraising on an annual basis — and then evaluate their performance in part based on those targets

When the provost serves as co-chair of the campaign planning process, this also sends a powerful message that the campaign is an institutional priority, not just a priority of the development office.

Notably, the composition of the rest of the committee also reflects this philosophy. The Proudly Cincinnati steering committee includes a member of the board of trustees for the university foundation, deans of key schools, key alumni as well as the head of the alumni association, and a representative of the student government.



## AN INCLUSIVE PROCESS: CAMPUS INVOLVEMENT

Jim Langley proposes several steps to undertake during campaign planning that involve the entire campus and help you set up the most effective campaign:

- Establish a list of “exemplars” (key faculty, staff, and students) who can tell the story of what is happening at your institution in the present and what could be happening at your institution in the future
- Establish a storehouse of content that you can use to showcase particular programs and opportunities that you would like to fund
- During the quiet phase of the campaign, host four town hall meetings, inviting broad representations from across campus; these can be lunch-hour meetings that offer the chance to discuss the priorities of the campaign; this is an opportunity to invite honest feedback, build trust, offer transparency around the planning process, and cultivate campus-wide ownership of the campaign
- The planning co-chairs should meet with deans and then with faculty members to answer questions and concerns and share their own excitement for the campaign

The campaign, at its best, is a long conversation. In orchestrating a conversation between the institution and donors who have diverse interests over a multi-year period, we want that conversation to be led by our most impressive ambassadors — those faculty, students, and staff who are exemplars of the aspirations our institution is asking donors to fund.

**Jim Langley, Langley Innovations**



Recognizing that donors considering major investments in your institution will want to hear from those responsible for the execution of the institution's priorities, you will want to identify those faculty and staff who can serve as expert storytellers and ambassadors, as well as the types of students you will want to connect with donors.

"If you establish these 'supply lines' by approaching exemplars and helping them understand their role from the start," Langley adds, "then during the campaign you can move in the moment, without losing time and without losing the opportunity of that first impression. When a donor is excited and wants to hear more, you have someone ready who can talk with them about the project, and you keep the momentum."

Besides identifying people, Langley recommends building a "storehouse of knowledge" — that is, fact sheets, online videos, infographics, and white papers that can help educate donors about both the needs and the opportunities their gifts might address. This is also a key way for the whole campus to get involved in the campaign during its quiet phase; by producing this content and having conversations with planning committee members about the purpose and goals of the campaign and how the campaign can help fund their individual units, the best and the brightest on your campus get engaged in the campaign from the start.

## AN INCLUSIVE PROCESS: DONOR INVOLVEMENT

You don't want to try to bring donors on board after the fact, when they have had no hand in shaping the institution's vision. At the same time, during the campaign you also want to steer clear of following donor priorities that don't align with your vision; you don't want to be in the position of having met a campaign goal without having funded your priorities. You can manage this by talking through the vision together ahead of time with both internal and external stakeholders.

**Mark Jones, Vice President of External Relations, Hollins University**

Jones recommends:

Invite alumni representatives, faculty, staff, students, and trustees to offer their input in the strategic planning process for the campaign. This ensures that you craft a campaign that will fund the real needs of your institution — and builds buy-in and support throughout your institution for the campaign that will emerge from this planning process.

### **BUILDING FUNDRAISING PARTNERSHIPS BETWEEN DEANS AND DEVELOPMENT OFFICERS**

March 13 - 14, 2014 :: Scottsdale, AZ

**Learn how academic and advancement colleagues can build effective fundraising partnerships to increase giving and program support.**

Engage prospective donors in shaping the vision. Development officers can present drafts of vision statements and concept papers to individuals who can help you flesh out the environmental scan and your understanding of the market needs your institution can address. And by involving them at the outset, you invite their excitement and partnership in a set of priorities, rendering it far more likely that they will contribute financially.





## SUPPORTING THE WORK OF THE CAMPAIGN

---

Once the campaign planning committee has identified exemplars among your faculty, staff, and students, who can speak to the opportunities this campaign could fund for your institution, the next critical step is to prepare venues and vehicles for those ambassadors of your institution to tell their stories.

For advice, we turned to Santa Ono, provost at the University of Cincinnati, who has taken a lead role in mobilizing efforts across campus in support of the Proudly Cincinnati campaign; David Jones, associate vice president for student affairs and enrollment management at Minnesota State University Mankato; and Gene Luna, associate vice president for student affairs at the University of South Carolina. Ono and Luna are currently involved in \$1 billion campaigns; David Jones' division at Minnesota State supports the work of a \$75 million campaign (the largest comprehensive campaign yet for a state college in Minnesota). Jones' previous institution, the University of Alabama, undertook a \$600 million campaign during his time there.

Jones, Luna, and Ono offer three key suggestions:

- Define clear roles for faculty, staff, and students from the start
- Involve the whole campus in engaging alumni
- Empower students to get involved — beyond stewardship activities

## DEFINING ROLES: THE CAMPUS AND THE ASK

---

Santa Ono, provost at the University of Cincinnati, notes the importance of developing a detailed plan of the specific role particular types of individuals will play in the ask. What is the provost's role in the ask? What is the student's role in the ask? "The student's role is *not* to ask," Ono notes. "Their role is to be honest in their excitement about being students. The faculty's job is not to make the ask; their job is to talk about their cutting-edge research. But do they know this?"

Ono suggests that the provost and the vice president of advancement partner with the faculty senate to develop a "curriculum" for the campaign. This is a plan that both presents the "big picture" (the aspirations and goals of the campaign and how those goals support the institution's mission) and defines the role of internal stakeholders throughout the institution.

Creating a culture of philanthropy that mobilizes faculty, students, chairs, deans, and division heads to participate in the storytelling and relationship-building that leads to the ask requires having a framework that lets each individual know how they can contribute meaningfully to that conversation.

### **Santa Ono, University of Cincinnati**

For example, for staff on the administrative side of the house, involvement in the institution's campaign primarily means:

- **Sharing success stories** — student affairs professionals often share stories of student success and student engagement with the media relations office; Jones and Luna advise sharing these stories with the development office, as well. These are the stories that donors care about.
- **Sharing data** — specifically, data that can help quantify the impact of a donor's gift. For example, Minnesota State University Mankato worked with Noel-Levitz to identify seven factors that influence a freshman at that institution to return the second year, and four of those factors were financial. "We calculated down to the penny what amount of aid helps a student persist," Jones notes. "This both helped us allocate our scholarship funds wisely and helped us tell a compelling story to donors. For example, suppose the average tipping point is \$5,400 — the amount that will empower most students in need to persist into the second year and be successful. The enrollment manager, when presenting the story of the need and the opportunity for scholarships, can give exact figures. \$3,000 will get the donor halfway to helping a student succeed; a \$9,000 gift will be nearly enough to support two students, and if they were to add just a little more, they would have two students fully funded to return for the second year."
- **Sharing prospects** — professionals in student affairs and enrollment management are often the staff who see the most interaction with parents. Jones encourages his staff to share with the development office those contacts who appear most engaged with the institution.

## ENGAGING PROSPECTS

Ono notes that late in the Proudly Cincinnati campaign, the institution has seen a significant uplift in its success in bringing in large, multimillion dollar gifts. While Ono is careful to note that not all of this can be attributed to efforts to “create a culture of philanthropy” throughout the institution, those efforts have had a significant impact. He cites the example of a large bequest to the institution’s urban planning institute, which was largely the work of the dean responsible for the institute.

When first approached, the dean was reluctant about his involvement in the campaign and hesitant at the prospect of having to ask donors for money. When the dean realized that he did not have to make the ask — that his role was to convey his excitement about what was happening at his college — he turned out to be an exemplary ambassador for the institution.

“He was pivotal in bringing in that \$10 million gift,” Ono explains. “We also brought in students in urban planning and architecture, and invited the donor to visit the studio and see the students at work while discussing the institute with the dean. We invited the donor into the excitement of the learning experience. That visit was a pivotal and deciding moment, at which the transformative power of a potential gift was tangible and visible.”

### **REACHING YOUNG ALUMNI: ESTABLISHING LIFELONG RELATIONSHIPS**

January 27 - 29, 2014 :: Baltimore, MD

**Learn key strategies for engaging young alumni.**



But while faculty and deans may have the most significant role to play in engaging potential major givers, Jones and Luna stress the importance of friendraising efforts on the administrative side of the house, which can help cultivate future givers, ensuring the health of the next campaign.

For example:

- Student affairs staff can send holiday cards and invitations to special events to those parents and other contacts who are especially engaged with the institution
- Invite engaged parents and young alumni to serve on advisory groups or parent leadership councils to provide input and feedback for student affairs programming. Jones recommends selecting parents for these groups who are opinion leaders within their own social and professional networks. The advisory group thus forms a link to their network, and an initial step for that parent to become a more engaged and long-term friend of the institution.
- As you hold recruiting events, involve alumni who are active givers in the event. This achieves several aims: it helps increase alumni investment in the institution by connecting alumni givers with the students your institution is investing in, and it increases the interest from potential students and their parents by connecting them with former students who have achieved success as students and then as alumni.

## OPERATIONALIZING STAFF INVOLVEMENT

Ono emphasizes that staff involvement needs to be an expectation set, evaluated, and rewarded from the top. For example, at the University of Cincinnati, Ono consults with his deans to establish overall annual fundraising targets that are unique to each college and are driven by the academic priorities of that college. The provost then partners with the development office to provide training and support for the deans, and evaluates the deans on reaching the target as part of their performance evaluation. Consequently, Ono sees more enthusiasm and commitment toward enterprise-wide involvement in advancement activities than at previous institutions at which he has served.

Similarly, both Jones and Luna speak to the importance of hiring staff in student services who are well-suited to “friendraising,” and ensuring that friendraising activities are included in key job descriptions.



## ENGAGING THE BOARD OF TRUSTEES

Board members have a unique and highly visible role to play in the campaign, yet are often under-utilized and under-involved. Read our article [“Engaging the Board in the Campaign”](#) for practical tips on making the most use of board involvement during both planning and implementation.

## WAYS TO INVOLVE STUDENTS

---

Too many institutions invite students to the campaign only for limited stewardship activities. Missed opportunities include:

- Maximizing the occasions available for students to tell their story to donors (e.g., through student participation in key events and through donor visits to classrooms and labs)
- Educating students about the campaign and the ways in which their education is funded, and inviting them to think of themselves as lifetime recipients of services and of value from the institution and as potential donors

For example, several institutions have replaced the traditional senior gift — a one-time, often transactional offering that encourages students to think of this “giving back” as a closing of the loop in their relationship with the institution — with the senior campaign, an organized year-long effort led by student leaders and supported by development officers and faculty.



During the years of a capital campaign, the senior campaign presents an opportunity to:

- Educate students about the institution's aspirations and direction for the future
- Invite students to get excited about the current campaign and how it will carry the great experience they have had into the future and improve upon it
- Encourage student leaders to get involved not only in "giving back" but in mobilizing support and engagement from the student body
- Educate students about how a campaign works — preparing them for involvement in future campaigns
- These student leaders may be your future alumni volunteers, and some of them may be your future major donors.

These student leaders may be your future alumni volunteers, and some of them may be your future major donors.

#### PROUDLY PENNIES

Here is an example that is one level of commitment up from a senior campaign. As a way of participating in the University of Cincinnati's \$1 billion Proudly Cincinnati campaign, the student body organized its multi-year "Proudly Pennies" campaign, with the goal of raising one billion pennies. You can [read more about the student campaign here.](#)

#### **RECRUITING AND TRAINING TALENTED DEVELOPMENT OFFICERS**

February 27 - 28, 2014 :: San Diego, CA

**The average tenure of a development officer is 16 months - are you prepared to recruit and train new development officers when they turnover?**





## CONFERENCE

### **Engagement-Focused Fundraising: A Whole-Shop Approach**

January 15 - 17, 2014 :: Boston, MA

Learn a fresh, comprehensive approach to improving your fundraising performance.

<http://www.academicimpressions.com/conference/engagement-focused-fundraising-whole-shop-approach-jan-2014?qq=21240v274891yT>

## LOCAL BUSINESS AND COMMUNITY LEADERS AND YOUR CAMPAIGN

Often, institutions miss opportunities to invite the investment of local business and community leaders by not doing enough to invite and cultivate that investment before the campaign even begins. Mark Jones, vice president of external relations at Hollins University, frames the issue in this way:

“There are two ways to approach to business and community leaders during the campaign. One is to take a set of institutional priorities that you have vetted and articulated and negotiated internally — a unified vision for the institution — and approach potential donors with that case: Support us because we have this carefully crafted and articulated vision. Here are our greatest needs; help meet them. But what works better is to engage prospective donors in shaping the vision. Then, business and community leaders are already bought in to the campaign, because they had input during the planning.”

When we asked an array of consultants and advancement professionals what made the greatest difference in inviting philanthropic support from local leaders, the experts we interviewed all directed attention to the need to listen actively to local business and community needs and identify (together) shared projects in which they can invest time and expertise, before ever inviting them to contribute funds.



## IDENTIFY AND LEVERAGE LOCAL POWER BROKERS

Invite local power brokers to board dinners and events regularly. Get to know them. When your board members visit the campus for board meetings, have your board host events on campus, where they invite local political, civic, and business leaders. Where they spend time listening to their concerns and ideas.

**Bruce Flessner, Bentz Whaley Flessner**

Besides board-hosted events, form small visiting committees and advisory boards that either serve to provide input and feedback to initiatives for a particular college or office on campus (for example, input on attracting students to STEM disciplines or input on plans to improve student services) or to serve as a sounding board for cross-campus efforts such as internationalizing the curriculum or boosting student retention.

Flessner advises:

- Select problems or opportunities in which both the institution and local leaders share a stake
- Engage in listening exercises, collecting input and ideas from an advisory board, rather than simply sharing a plan with them
- Offer concrete, specific tasks that leverage the advisory board's expertise and connections

This can't just be about the advancement office reaching out, though certainly your CFR office can manage these relationships. The whole campus needs to have a relationship with the community. Cabinet members need to serve in community leadership roles, and need to listen actively to community needs.

**Bruce Flessner, Bentz Whaley Flessner**

The more successful your institution proves in inviting a sense of shared enterprise and shared purpose, the more effective you will be in inviting financial investment from corporate partners and local donors during the campaign.

## BUILD WHOLE-CAMPUS, MULTIDIMENSIONAL RELATIONSHIPS WITH CORPORATE PARTNERS

Chris Groff, executive director of corporate and foundation relations at Fairleigh Dickinson University, calls attention to a recent white paper published by the Network of Academic Corporate Relations Officers (NACRO) entitled "Five Essential Elements of a Successful Twenty-First Century University Corporate Relations Program."



The white paper makes the critical point that “corporations no longer consider themselves ‘donors’ to academia; they consider themselves ‘investors,’” and that as corporations approach colleges and universities on an enterprise level rather than a philanthropic level, they are looking to institutions as partners in solving some of the needs of their organization.

Groff adds, “Companies are now very accountable for the funding they give to philanthropic efforts; you really need a broad and deep relationship with the company. You’re not only responsible for just bringing in money but for bringing in relationships.”

Groff suggests:

- Make your CFR office a one-stop shop for corporate inquiries, connecting corporate contacts with the right people across the institution
- Educate constituents across campus about what to do when they receive a corporate inquiry and how to connect CFR with the corporate contact
- Look for multidimensional partnerships

Groff suggests that institutions approach corporations with a more comprehensive checklist of potential relationships to consider. For example:

- Are there research opportunities you could partner on?
- Do they have a need for executive education that your business school could meet?
- Are there opportunities for sponsored research? Tech transfer?
- Have you connected them with your career services office and with opportunities to recruit students?
- Could you engage their employees as volunteers?



Once you have established a partnership in one of these areas, mine for more. If you have a career services partnership with a business, reach out to them and ask if they have any needs around executive education. Create multiple layers of partnership with that organization. Companies love that. They want to see you as an advocate for them, helping them get more employees, helping them get the research they need, etc. Companies will be more philanthropic with you after there’s a partnership established. If they are already engaged in a shared effort, then their contribution to the campaign becomes an easier conversation.

**Chris Groff, Fairleigh Dickinson University**



**LEARN MORE**

In our November 2011 article “An Engagement-Centered Approach to Corporate Relations,” Chris Groff offers advice for cultivating and stewarding corporate relationships over the long term.

