

Transitioning Leadership Donors to Major Donors | 10.12.2016

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Please find a list below of additional resources from the *Transitioning Leadership Donors to Major Donors* webcast. These resources will be useful as case examples to follow along with the event and to keep as process reference. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [Prospect/Donor Conversation Guide](#) – Pages 2-33 – Conversation guide for productive meetings with donors and sample stewardship plan.
2. [Donor Impact Report](#) – Pages 4-7 – sample donor impact report for a leadership annual gift donor.
3. [Donor Impact Report](#) – Pages 8-10 – sample donor impact report for a major gift donor.
4. [Donor Survey](#) – Pages 11-12 – sample donor survey for leadership annual gift donors.
5. [Stewardship Plan Calendar](#) – Page 13 – a copy of the calendar show in the Powerpoint in full size

Transitioning Leadership Donors to Major Donors

PROSPECT/DONOR MEETING CONVERSATION GUIDE

INTRODUCTION | SET CLEAR PARAMETERS FOR THE MEETING:

- *Thanks for meeting with me/us.*
- *As you know, we want to update you on our effort to increase student scholarships and how your increased support can make an impact on our law school and its students.*
- *We know your time is valuable and we want to be sure you leave today's meeting with a better understanding of the impact that scholarship support has, how your past support has directly made a difference and how increased support of our efforts can allow us to serve more students and strengthen our law school.*

RAPPORT | GET CONTROL OF THE MEETING FROM THE OUTSET

- *Thanks for taking time to meet with me to discuss USD School of Law. You've been a generous supporter of our efforts and we truly appreciate the impact you make through your philanthropy.*
- *As you know, I wanted to discuss what our law school is doing to continue providing a world-class education for our students and how we can involve you in our efforts, but before we get to that, I wanted to ask you a few questions about your experience as a student and alumnus of our law school.*

CONTROLLING TANGENTS | DONOR IS PONTIFICATING ON POLITICS, SPORTS, ETC...

- *I could talk to you about the poor state of the basketball program all day, but I know we have limited time today and I want to be sure we have time to discuss our Center on Intellectual Property Law & Markets.*
- *As you know they have an upcoming symposium on copyright infringement. Have you had a chance to see the program?*

IDENTIFYING WHEN TO ASK

- *Have you identified giving priorities?*
- *Have you effectively outlined a case for support related to those giving priorities?*
- *Are you a philanthropic priority for the donor?*
- *Do you know that the time/project are right for the donor?*
- *Is the ask part of a larger strategy?*

THE ART OF MAKING THE ASK

- Guide the conversation to build to YES
- Track their positive responses (from this and past conversations) and utilize in transitioning from your case to the ask

CLOSING SAMPLE QUESTIONS

- *Are you in a position to decide at this time?*
- *Would you like to bring your spouse/partner to see the program?*
- *What further information do you need?*
- *Can I introduce you to the chief "x" involved?*
- *Would you like to think about the opportunities for having your name on x?*



Donor Impact Report

USD School of Law

Presented to:

Bob Jones

January 2014



Maudsley Fellows Society Report for Bob Jones

Report from USD School of Law Student – Victoria Green

My name is Victoria Green, and I am proud to be a student at USD School of Law and thankful to be the beneficiary of the Dean's Scholarship Initiative. Like many students, I carefully considered the cost of obtaining a legal education when I was deciding where to go to law school. Attending law school is not only a daunting task, but a substantial financial commitment as well. As one of six children, I could not imagine burdening my parents with the expense of putting me through law school. Instead, I am supporting myself financially and covering all of the costs of my legal education.

Receiving the Alumni Honor Scholarship was instrumental in providing the financial support I needed to attend USD School of Law. USD was my top choice because of its tremendous reputation and the wide range of opportunities that would be available to me as a student and future graduate. The school's outstanding faculty, combined with the Business and Corporate Law concentration, were some of the specific reasons I chose USD. It was the Alumni Honor Scholarship that provided me with the resources to enroll and pursue my dream of practicing corporate law.

I could not be happier with my choice. In my time at the law school, I have been impressed with the commitment the entire USD School of Law family has toward supporting students. Whether it is through the volunteer efforts of alumni, like you, who give of their time and generous financial support, or the work of the Office of Career and Professional Development in assisting me in my job search, students like me are guided and nurtured to succeed.

As someone who has directly benefited from the generosity of our alumni, I thank you helping to make it possible for me to attend USD School of Law. I am so thankful for the opportunities that have been presented to me and want to convey my sincere appreciation for the contribution you have made to my success.

Message from the Dean

Thank you for your commitment to the University of San Diego School of Law. As a member of the Maudsley Fellows Society, I am pleased to provide you with a few highlights of the impact that you, and your fellow Maudsley Fellow Society members have made on the law school.

While Maudsley Fellows donors comprise only 12% of our donors, they were responsible for providing 78% of our annual fundraising totals last year—thank you for your leadership support! Your generosity provides critical funding to achieve our goals and sets a valuable example for others to follow. This distinguished group of donors provides the cornerstone of private support to the law school, and your gifts enable the law school to maintain high standards of excellence in legal scholarship and teaching that benefit our students and the legal community as a whole.

The impact of Maudsley Fellows support on USD School of Law is evidenced in so many ways, including:

- Providing \$425,000 of support for the Dean's Scholarship Initiative. The Dean's Scholarship Initiative supports our efforts to attract and retain top students while also supporting the Graduate Jobs Initiative
- Funding for annual professorships including the J. Lawrence Irving Distinguished Teaching Fellow and the George E. Barrett Professor of Law and Finance
- Provided funding to establish 3 "smart" classrooms this year to better enable our teachers to harness the power of technology in their teaching
- Supported lectures and symposia on many of the most challenging legal issues facing our leaders today including:
 - o Journal on Climate and Energy Law's Annual Symposium
 - o Intellectual Property Law and Markets Roundtable Series and Conference on Artificial Intelligence and the Law
 - o Center for Corporate and Securities Law's Corporate Directors Forum

These are just a few of the ways your gift as a member of the Maudsley Fellows Society makes an impact on our law school. Thank you for your support of these important initiatives and all that we do at USD School of Law.

History of the Maudsley Fellows Society

The Maudsley Fellows Society was created in 1992 in honor of Professor Ronald H. Maudsley (1918-1981). Born and educated in England, Professor Maudsley became a Distinguished Professor of Law at USD soon after immigrating to the United States in 1977. An admired and respected teacher and scholar, Professor Maudsley served at USD School of Law until his death in 1981.

MAUDSLEY FELLOWS SOCIETY LEVELS

Dean's Senior Counsel	\$50,000+
Dean's Counsel	\$20,000 - \$49,999
Senior Partner	\$10,000 - \$19,999
Partner	\$5,000 - \$9,999
Senior Associate	\$2,500 - \$4,999
Associate	\$1,500 - \$2,499
Affiliate*	\$500 - \$1,499
*graduates between 2006-2013	

Summary of Maudsley Fellows Support

USD School of Law is fortunate to count you as member of the Maudsley Fellows Society. Last year, Maudsley Fellows Society members contributed \$1,253,000 to 24 different initiatives within the law school. The generosity of our Maudsley Fellows Society has allowed us to support our mission of providing a world-class legal education for our students while expanding programs that build on our students experience. Over the last decade, Maudsley Fellows Society members have contributed over \$15,000,000 to USD School of Law. Your impact as a member of this distinguished group of donors has been profound, and Maudsley Fellows Society member's contributions have been the single largest source of funding (excluding tuition) over this time.

Our mission at USD School of Law is to provide a world-class legal education for our students that prepares them to be leaders, not just lawyers. With the support of our Maudsley Fellows Society donors, we are better positioned to carry-out our mission and build on the success that has defined USD School of Law for the last 60 years.



Donor Impact Report

USD School of Law

Presented to:

Bob Jones

January 2013



Scholarship Impact Report for Bob Jones

Report from your scholarship recipient – Jim Jenkins

Your generous support of USD School of Law and my scholarship has allowed me to pursue my interest in international law. Receiving the Bob Jones International Scholarship has been a defining moment of my legal education as it has allowed me to focus my energies on my scholarly studies of the Trans-Pacific Partnership agreement instead of worrying about how I will finance my legal education.

I cannot adequately express to you how important this scholarship has been to me and what it means to be its recipient. It stands as a testament to my hard work and has encouraged me to work even harder to achieve my goals and help pay your generosity forward when I become a graduate of USD School of Law.

Message from the Faculty Chair of International Programs – Prof. Mike Logan

Thank you so much for your appreciation for the importance of developing our programs in international law. With increased globalization, this is an area that is of increasing importance for our students, particularly with our location on an international border and close ties to the Pacific Rim. Our graduates will be entering a legal environment that is increasingly globalized, with international issues impacting the full spectrum of practice areas with internationally trained (and multilingual) foreign attorneys competing for clients, cases and transactions. Your funding of scholarships for international students has expanded the worldview of ten students like Jim Jenkins, and I know they are all extremely grateful for the opportunities afforded them as a result of your generosity.

I am pleased to tell you that we have ambitious plans to increase the scope of our international programs and expand our efforts with newly minted exchange programs in Barcelona, Dublin and Dubai. These will add to our 12 existing programs and continue to bolster opportunities for our students to increase their exposure to international law and their future job prospects. I hope one day to meet you in person to express my gratitude for the impact you have made on our students, programs and our law school as a whole. You have greatly assisted us in producing graduates who will be better prepared to enter the challenging and competitive legal marketplace with global fluency.

USD School of Law International Programs

USD School of Law offers legal education opportunities in Europe, Asia and Latin America. Fully integrated with the law school's regular international and comparative law course offerings, USD's four law summer study abroad programs and eight semester abroad programs provide a strong curricular focus.

USD's summer study abroad programs are open to USD law students and students enrolled in ABA accredited and foreign law schools. They provide intensive training in international, comparative and foreign law, while introducing American students to the legal institutions of another country. At the same time, students from Commonwealth and civil law traditions experience American legal viewpoints and problem-solving methods. Programs bring together students and expert faculty for a rich experience of academic and cultural interchange.

Summary of Your Support

USD School of Law is fortunate to count you as a supporter of its efforts. Since 2001 you have contributed \$565,000 to support student scholarships for our international programs. Your generous support has allowed us to support our mission of providing a world-class legal education for our students while expanding our international programs and the funding for students to study abroad. Overall, your support has provided scholarships for 55 students who have had a chance to study abroad thanks to your generosity. Your impact on our school and students has been profound and our international programs would not be the same without your support.



Thank you for your recent gift at the Maudsley Fellows Society level (\$1,500+). As a member of the Maudsley Fellows Society, your support sets an example for others to follow and has a significant impact on nearly every aspect of our law school. Whether it is supporting student scholarships, funding new programs like our Center for Intellectual Property Law & Markets or providing resources to recruit and retain our world-class faculty—Maudsley Fellows Society donors are helping our law school expand its reputation as a center of excellence for legal education.

We hope you will take just a few moments of your time to answer a few questions that will assist us in providing benefits for our Maudsley Fellows Society members.

1. On a scale of 1-10 with 1 being the lowest and 10 being the highest, how would you rate the following factors in their importance to your support of the School of Law?
 - a. My legal education has made a positive impact on my life and is the reason I give back to my alma mater -- _____
 - b. My contribution assists in ensuring USD School of Law keeps its top-tier ranking -- _____
 - c. I want to provide additional funding for student scholarships -- _____
 - d. My contribution allows USD School of Law to attract and retain top faculty -- _____
 - e. Supporting student programs like moot court, mock trial, law review journals and clinical training -- _____
2. On a scale of 1-10 with 1 being the lowest and 10 being the highest, how would you rate the following areas in order of interest to you?
 - a. The law school as a whole -- _____
 - b. Centers and institutes like the Children's Advocacy Institute, Center for Public Interest Law or the Energy Policy Initiatives Center -- _____
 - c. Career services -- _____
 - d. Current rankings -- _____
 - e. Legal Clinics -- _____
 - f. Faculty accomplishments and highlights -- _____
 - g. Personal student stories -- _____
3. On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate the following law school priorities in order of importance to you?
 - a. Increasing scholarship support -- _____

- b. Enhancing and expanding academic and programmatic support – for areas like our centers, institutes and legal clinics -- _____
 - c. Increasing funding for the Legal Research Center -- _____
 - d. Increasing resources to recruit and retain top faculty -- _____
 - e. Providing unrestricted support to meet the law school's highest priorities -- _____
 - f. Enhancing/renovating the school's physical plant -- _____
 - g. Other -- _____
4. If you were invited to attend an event, which of the following would you be most interested in attending?
- a. A lecture on a topic of interest to me -- _____
 - b. An athletic event -- _____
 - c. A networking event with fellow alumni -- _____
 - d. A networking event with current students -- _____
 - e. A breakfast/lunch/dinner with the Dean of the law school and other Maudsley Fellows Society members -- _____
 - f. None of the above -- _____
 - g. Other -- _____
5. On a scale of 1-10 with 1 being the lowest and 10 being the highest, how would you rate the following potential member benefits and their interest to you?
- a. Special communication from the Dean of the law school -- _____
 - b. Breakfast/Lunch/Dinner with the Dean -- _____
 - c. Recognition on the donor wall in Warren Hall -- _____
 - d. Recognition in the Advocate, the semi-annual USD Law magazine -- _____
 - e. Tangible gifts; i.e. lapel pin, decal, bookmark, pen, etc. -- _____
 - f. Other -- _____
6. Would you be interested in learning about how you can include USD in your will or living trust?
- a. Yes _____
 - b. No _____
7. Please provide any additional information that may be useful to us in providing benefits to our Maudsley Fellows Donors.

			Q1			Q2			Q3			Q4	
Donor/Prospect	Identified Interests	July	August	September	October	November	December	January	February	March	April	May	June
Johnson, Bob	Scholarships, Intellectual Property Law, Mock Trial		Donor Impact Report - Maudsley Fellows		Letter from scholarship recipient	Personal invitation to attend basketball game with the dean	Calendar year end thank you from the dean	Luncheon with director of Center for Intellectual Property Law and Markets	Invitation to scholarship luncheon		Scholarship luncheon		Maudsley Fellows recognition listing and photo of name on donor wall