



FUNDRAISING AND FRIENDRAISING FOR SENIOR LEADERSHIP

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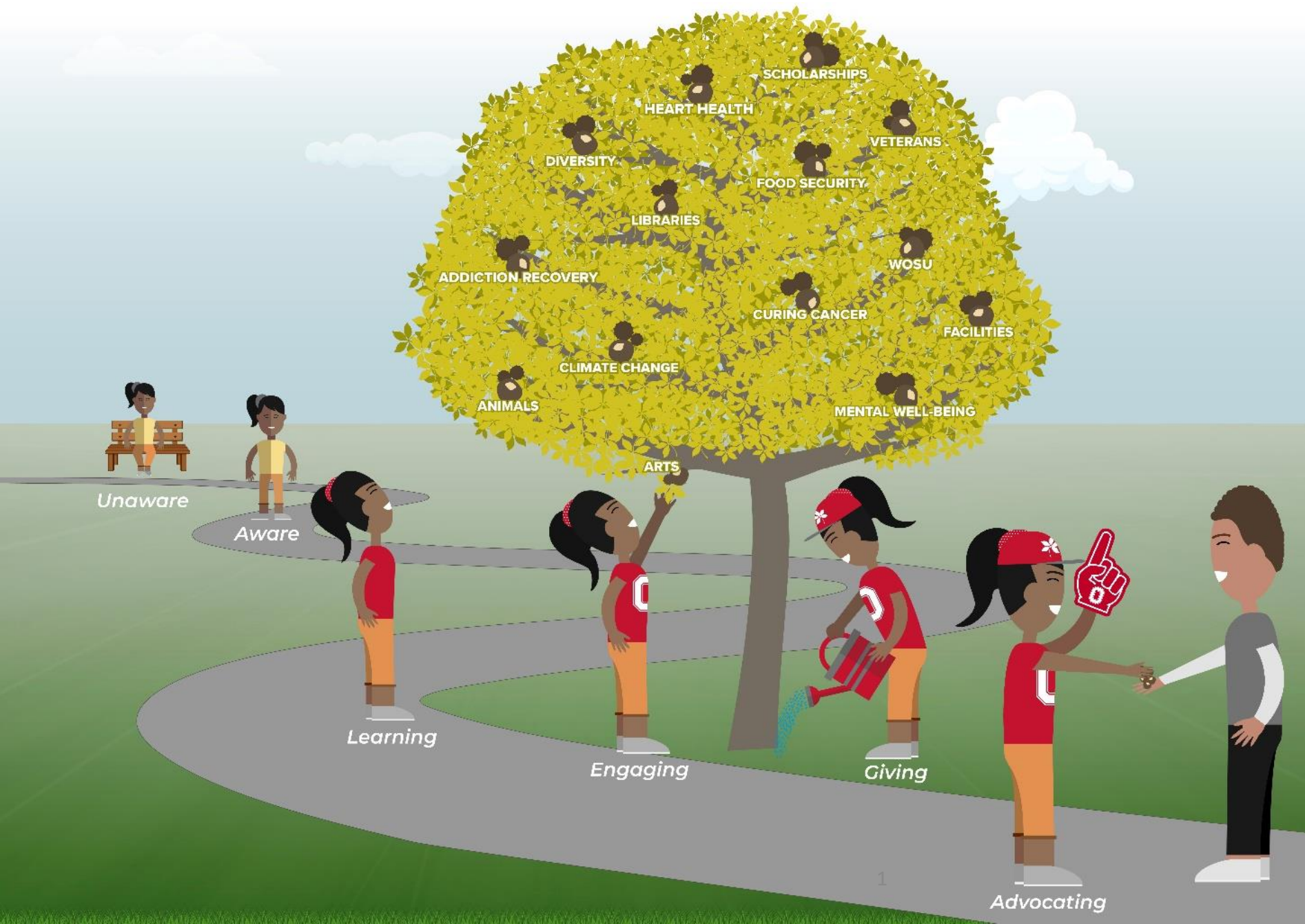
INSTITUTIONS ARE EVER EVOLVING, ASPIRING AND STRIVING

- To be better at what they do
- To distinguish themselves from their peer
- To transform themselves
- To positively impact the world

FUNDRAISING OVER TIME

1950s	1970s	1990s	2000s
<ul style="list-style-type: none">• Events• Bake sales• Estates• Booster events	<ul style="list-style-type: none">• Organized alumni associations• Galas• Annual Appeals• Small campaigns	<ul style="list-style-type: none">• Board shifts• Business approach• Institutional commitment• Modern campaigns• Development & Alumni Relations	<ul style="list-style-type: none">• Mega Philanthropy in the digital age• Culture of Philanthropy & engagement• Advancement Models• Accountability• Big Ideas• Focus on major gifts

INSTITUTIONS WORK ON A CONTINUUM WITH A GOAL OF BUILDING AND SUSTAINING RELATIONSHIPS THAT WILL CONTINUOUSLY NURTURE INSTITUTION NEEDS.



OUR

**Building a
community
of lifelong
champions.**

PURPOSE



Engagement

Internally ↔ Externally

Understanding
our
constituents

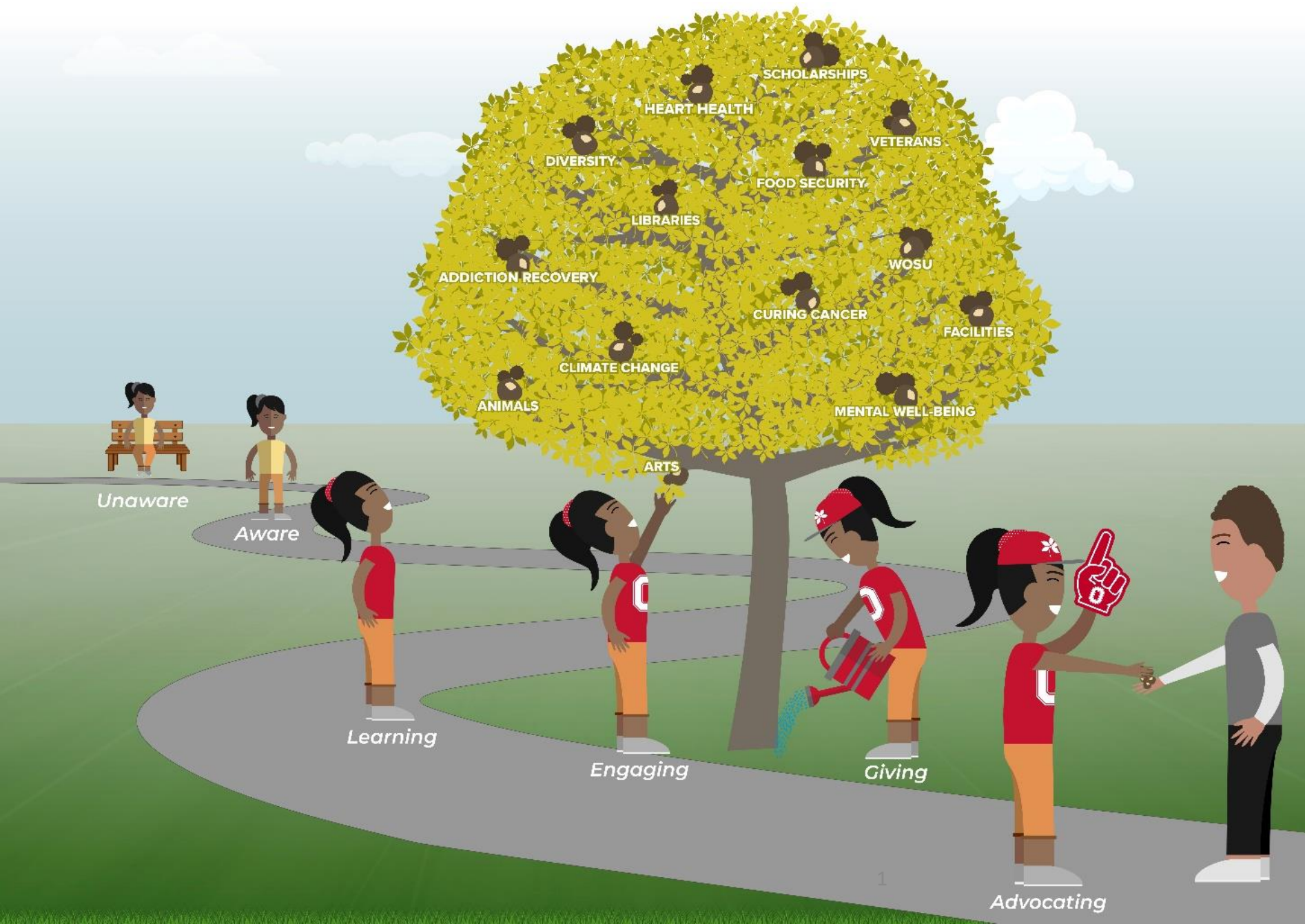
- Alumni data
- Alumni census project
- Constituent needs for the future

Annual
campaigns
and expanded
programming

- Promotion of diversity initiatives
- Accessibility and interests
- Communications framework

Talent Pipeline

- Leadership Annual Giving
- Volunteer leadership
- Students



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PURPOSE

**DONOR EQUATION:
ENGAGEMENT + CAPACITY TO GIVE +
READINESS TO GIVE**

**IDENTIFYING → QUALIFYING → CULTIVATING →
SOLICITING → STEWARDING**

WHAT MAKES A GOOD PROSPECT?

- Volunteer
- Demonstrated philanthropy
- Loyal donor
- Engaged in programming
- Multiple relationships in institution
- Family also affiliated
- Interest specific
- Demographic:
 - Grown or no children
 - Career and status of employment
 - Age
 - Wealth Estimate
- Student Philanthropy
- Peer to Peer

...ALSO GOOD PROSPECT

- Unaffiliated philanthropists with specific goals
- Entrepreneurs
- Grateful patients, clients
- Membership
- Past engagement or experience with impact of previous gifts
- Sense of obligation
- Others

KEY COMPONENTS OF THE MAJOR AND PRINCIPAL GIFTS PROCESS



Building communities of prospective donors



Delivering exceptional stewardship



Shaping the proposition



Discovering donor interests and values and connecting to strategic priorities



Crafting & executing an engagement plan



Formulating large scale philanthropic propositions

KEY TO MAJOR GIFT FUNDRAISING



1. What would make us better?
2. What would differentiate us?
3. What would transform us?

FORMULATING LARGE SCALE PHILANTHROPIC PROPOSITIONS : BUILDING A COMPELLING PROPOSITION INTERNALLY



- Identify core mission of institution
- Find right benchmarks and metrics for growth and success
- Identify what will success look like
- Define how institution is uniquely suited to leverage or expand reach
- Identify key weaknesses where philanthropic support makes a difference

FORMULATING LARGE SCALE PHILANTHROPIC PROPOSITIONS : BUILDING A COMPELLING PROPOSITION INTERNALLY



- Clarify actual costs, policies and practices to reach philanthropic aspirations
- Find likely tradeoffs of “raising the bar” and likely costs of doing nothing
- Articulate the likely impact of success- long term and short term, what will change because of this gift?
- Identify if the gift is aligned with strategic imperatives and budget model
- Would gift provide momentum for larger scale initiative or influence the gift of others?

SHAPING THE ASK: WHAT MATTERS TO THIS DONOR?



- What are all the factors that might motivate this donor at this moment?
- What's the likely impact of the gift?
- Is there urgency?
- Are you briefed on the likely impact of the gift, the potential risks?
- Who is asking for the gift?

WHAT MIGHT MOTIVATE A DONOR?



SO WHAT ROLE DOES A SENIOR LEADER PLAY?

- Ensure the delineation of a robust academic vision, and within it, a strategic role for private gift support
- Configuring compelling propositions around your program's strategic imperatives
- Partnering with major gift professionals to build “connections” and trust
- In actual solicitations, to help with the articulation of the gift proposition, reinforcement of its credibility, its likelihood of implementation and of its demonstrable impact
- Reaffirm the presence of academic and project leadership
- Commit time and energy to the engagement and “education” of prospective donors, to thoughtful dialogue around gift propositions, and to stewardship beyond their expectations
- Commit to building a culture of philanthropy in college, unit or school
- Drive accountability for that culture within the faculty and staff

WHAT CAN I EXPECT FROM A FUNDRAISING PROFESSIONAL?

- Building and facilitating relationships between past and prospective donors and the campus
- Extending those relationships to leaders in the community, stakeholders who might be “connected” to the campus in any way
- Enabling the effective partnership of internal (Academic, Administrative) and external (Volunteer) leaders in the engagement and solicitation process (the engagement and fundraising journey)
- Organizing and supporting a variety of “asking” initiatives
- Ensuring the establishment and refinement of short-term and long-term programs to acknowledge, recognize, and steward a widening circle of major gift donors

FUTURE OF FUNDRAISING: BEYOND THE BUDGET

- Culture of philanthropy
- Accountability and leadership
- Big Ideas
- Convergent work to support convergent science
- Aspiring outside the budget model
- Partnerships and large organizations
- Investment in continuum



DISCUSSION