

STRATEGIES TO BUILD A FUNDRAISING PIPELINE FOR GRADUATE EDUCATION

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Emory University

CGS Meeting

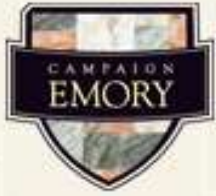
December 7, 2011

Scottsdale, AZ



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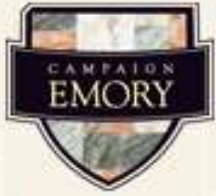


Good News

In 2010, contributions to colleges and universities rose 0.5% in the US to \$28 billion, according to the Voluntary Support of Education survey compiled by the Council for Aid to Education.

According to the CASE Funding Index (CFI), for the academic year that ended June 30, 2011, donations increased by 4.7% based on 2,100 member institutions in the US conducted during the first two weeks of July.

Looking ahead, fundraisers predict further growth of 5.5% for the academic year that began July 1, 2011.

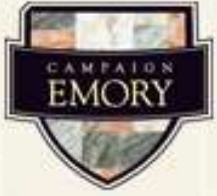


How to keep the momentum going to continue your institutions philanthropic growth



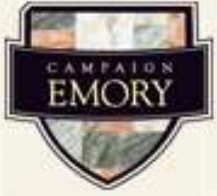
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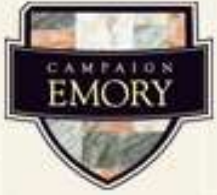
Invest in Development

- Make development and alumni relations a priority for all members of the graduate school team.
- Collaboration with fundraising staff is key
- EVERY interaction is an opportunity for cultivation and/or stewardship



Identify Strengths

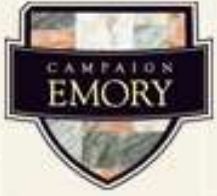
- Dean's priorities
- Faculty performing cutting edge research and the students who support them
- Unique programming, institutes and initiatives supported by graduate school



At the Laney Graduate School, our students challenge established conventions, ask unexpected questions and articulate bold new perspectives.

In return, we commit ourselves to providing our students the support they need to succeed at Emory and beyond.





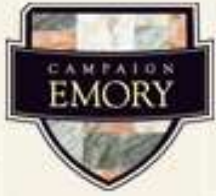
Professionalization

- PDS – Professional Development Support Funds
- Pathways Beyond the Professoriate
- Alumni Mentor Program
- Networking Events
- Academic Association Collaborations
- Grant Writing Program



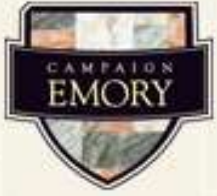
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Our students receive training from a diverse group of faculty spanning seven schools at Emory and partner institutions such as the U.S. Centers for Disease Prevention and Control, The American Cancer Society, The Carter Center and CARE





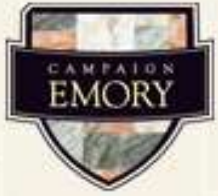
Training

- LGS Grant Writing Program
- Program for Scholarly Integrity
- TATTO – Teaching Assistant Training and Teaching Opportunity
- The Versatile PhD
- Interfolio

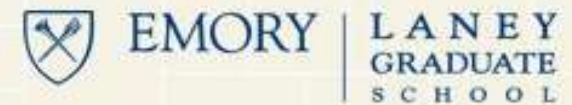


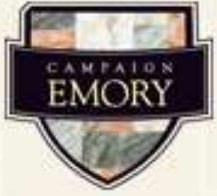
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The Laney Graduate School offers more than 40 graduate programs in the humanities, biomedical, natural and social sciences, as well as public health, business and nursing.

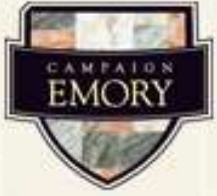




Growth

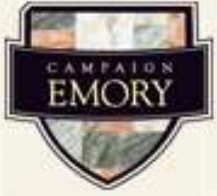
- Celebrate new programs
- Invite alumni to campus to participate when a new program is launched
- Acknowledge existing donors and celebrate scholars





Interdisciplinary training and research is not an occasional event; it is part of the very fabric of graduate education at the Laney Graduate School.





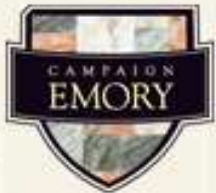
Collaboration

- Identify internal and external partnerships
 - School and unit collaborations
 - Community collaborations
 - Collaboration with other universities
- Perfect case for foundation and corporate support

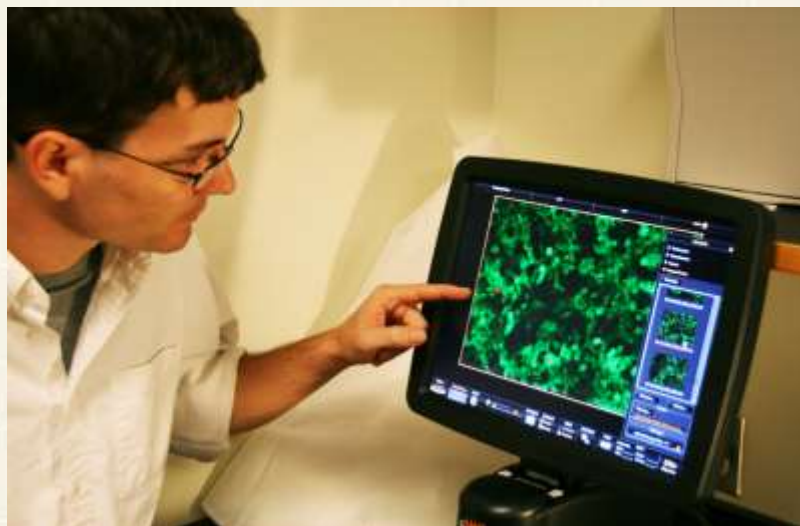


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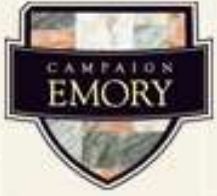


Our students have access to state-of-the-art facilities and resources to support their research.



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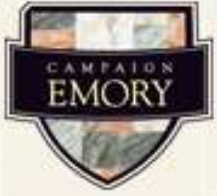
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Research Support

- Facilities
- Travel
- Conferences

...ties to PDS



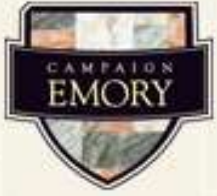
Connecting Priorities and Philanthropy

- Perception of fundraising role for university leadership has changed
- Everything is a vehicle to giving
- Engage students with philanthropy while still on campus
- Bridge donor intent and school's needs



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Categories of Giving

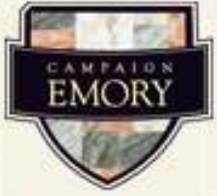
- Annual gifts – from income
- Major gifts – from assets
- Ultimate gifts – from estates

All are needed for a robust program!

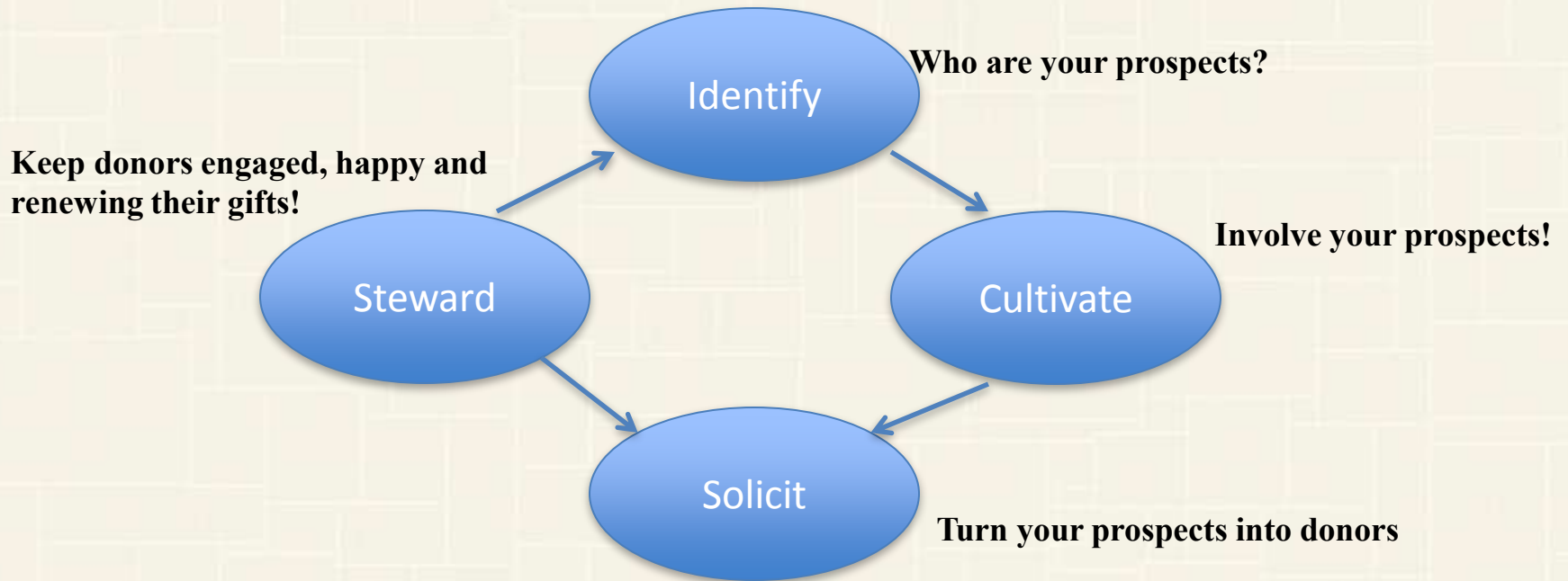


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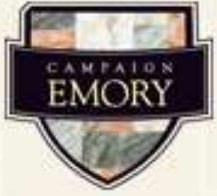


Traditional Fundraising Process



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I. Identification

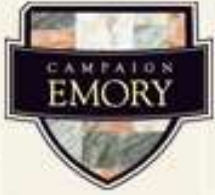
- Students – “student to alumni experience”
- Alumni
- Faculty/Staff
- Foundation/Corporate Relations
- Internal collaboration for prospecting

Remember – Alumni outreach and Annual Giving are not mutually exclusive – all communication should provide an opportunity for alumni to give




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Student & Faculty Giving Campaigns


Show Your Commitment



Annual gifts to the Laney Graduate School can help graduate students like you by providing critical program, fellowship, or emergency loan support.

Even small gifts—when combined with support from many others—can make a tremendous difference!

Visit <https://www.graduateschool.emory.edu/give>



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SUPPORTS THE LANEY GRADUATE SCHOOL

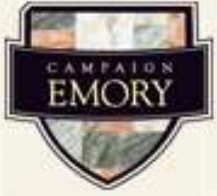
Rosemary Hynes joined the Emory staff 30 years ago as a research assistant. Today as an assistant dean and chief of staff for the James T. Laney School of Graduate Studies, she is as committed to Emory as ever. She supports MyEmory because her QR "truly can build something timeless."

For details, visit www.emory.edu/myemory



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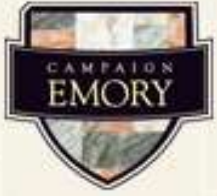
II. Cultivation

- Student engagement
- Alumni engagement
- Involving prospects in research/mission
- Volunteer engagement
- Boards, committees



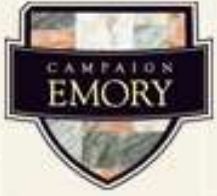
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III. Solicitation

- Don't make assumptions - Just because someone has wealth does not necessarily mean they are philanthropic
- Relationship are key – not everyone makes a gift in his/her name
- There is no such thing as “my donor”



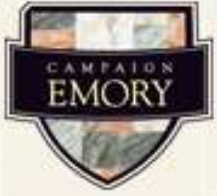
Ready to Solicit

- **Is this the highest and best ask?**
- **How can we raise sights?**
 - Using proper assets
 - Using the tools of planned giving
- **Internal vetting and approval of the proposed ask**
 - Other development officers, naming, program relevance/priority
- **Arrive at a mutual comfort level**
- **Set specific sights of gift importance and size**
- **Prepare the solicitors as much as the prospect!!!**



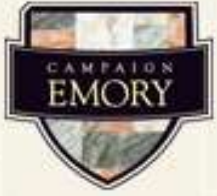
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The Ask

- Always prepare a proposal (even if it's not presented)
- Tailor your ask to the individual
- Always sufficiently prepare the prospect to be asked
- Share your plans with your colleagues
- Pick a suitable setting
- Always log your visits/solicitations in a contact report – historical information is vital for long-term relationships



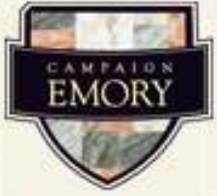
IV. Stewardship

- Ongoing stewardship is key to long-term relationship and future gifts
- Not every donor is the same – stewardship varies by person/family
- Every event is both a cultivation and stewardship opportunity
- Once a gift is given, a donor is immediately in “cultivation” stage towards next gift



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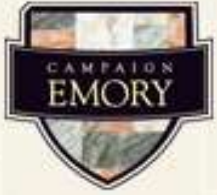
How the Dean Can Maximize Fundraising Effectiveness

1. Provide a clear and ambitious vision for the unit
2. Determine a focused set of fund-raising priorities
3. Communicate priorities to faculty and department chairs
4. Make time to visit with prospects several days per month
5. Develop long-term relationships with prospects
6. Engage in donor cultivation, solicitation, & stewardship
7. Create expectations for faculty involvement
8. Thank volunteers and donors frequently
9. Have high expectations of unit development officers



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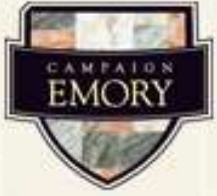
How Development & Alumni Relations Should Support School Leadership

1. Provide and support competent professional development and alumni relations staff
2. Establish university-wide standards for performance
3. Oversee annual planning & goal setting for school/unit
4. Providing training and seminars for development staff
5. Conducting formal evaluations of development staff
6. Providing university-wide operational support to schools/units
 - Annual Fund, Corporation/Foundation, Planned Giving, Development Communications, Development Research, Gift Processing, Donor Records, Event Planning, Stewardship.



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What Deans Should Expect from Development Professionals

1. A Development Operating Plan Providing:

- Goals for activities and outcomes
- Tailored strategies for major gift prospects

2. Campaign Strategy:

- Estimated time needed from dean/director & faculty for development efforts
- Estimated time needed for managing volunteer leadership & committees

3. Progress Reports Including:

- Prospect contacts (qualification, cultivation, solicitation)
- Proposals/solicitations completed
- Gift and pledge totals

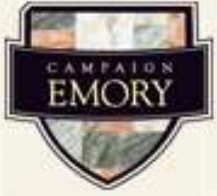
4. Proactive Contacts with Donors and Volunteers:

- Growing a pipeline of likely prospects
- Leadership in building strategies and coordinating next steps
- Developing effective proposals



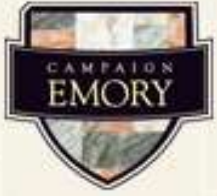
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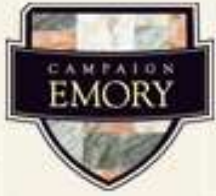
Break-Out Session: Overcoming Obstacles

1. Alumni Communication
2. Donor Retention and Stewardship
3. Prospecting
4. Student to Alumni Experience
5. Endowments
6. Foundation and Corporate Support



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Break-Out Session: Overcoming Obstacles

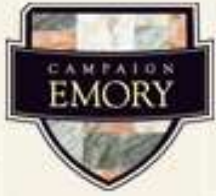
Alumni Communication:

Challenges/Opportunities



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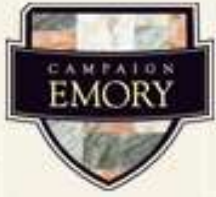
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Donor Retention and Stewardship:
Challenges/Opportunities



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Break-Out Session: Overcoming Obstacles

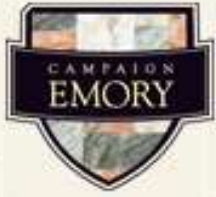
Prospecting:

Challenges/Opportunities



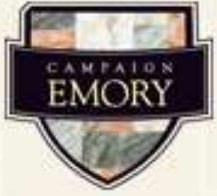
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Break-Out Session: Overcoming Obstacles

Student to Alumni Experience:
Challenges/Opportunities



Break-Out Session: Overcoming Obstacles

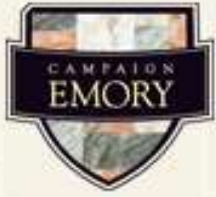
Endowments:

Challenges/Opportunities



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Break-Out Session: Overcoming Obstacles

**Foundation and Corporate Support:
Challenges/Opportunities**



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