

Graduate School Fundraising

2022 CGS Annual Meeting

December 7, 2022



Agenda

- I. The Art & Science of Development
- II. Building Your Case for Support
- III. Executing Your Plan
- IV. Working with your Development Officer

5 Myths of Graduate School Fundraising

5. Fundraising is for the Development Staff

4. Only Graduate Student Alumni Will Donate

3. It's really hard to raise \$ for the Graduate School

2. Other Deans are competitors for limited donor support

1. I'm not charismatic enough to be a good fundraiser

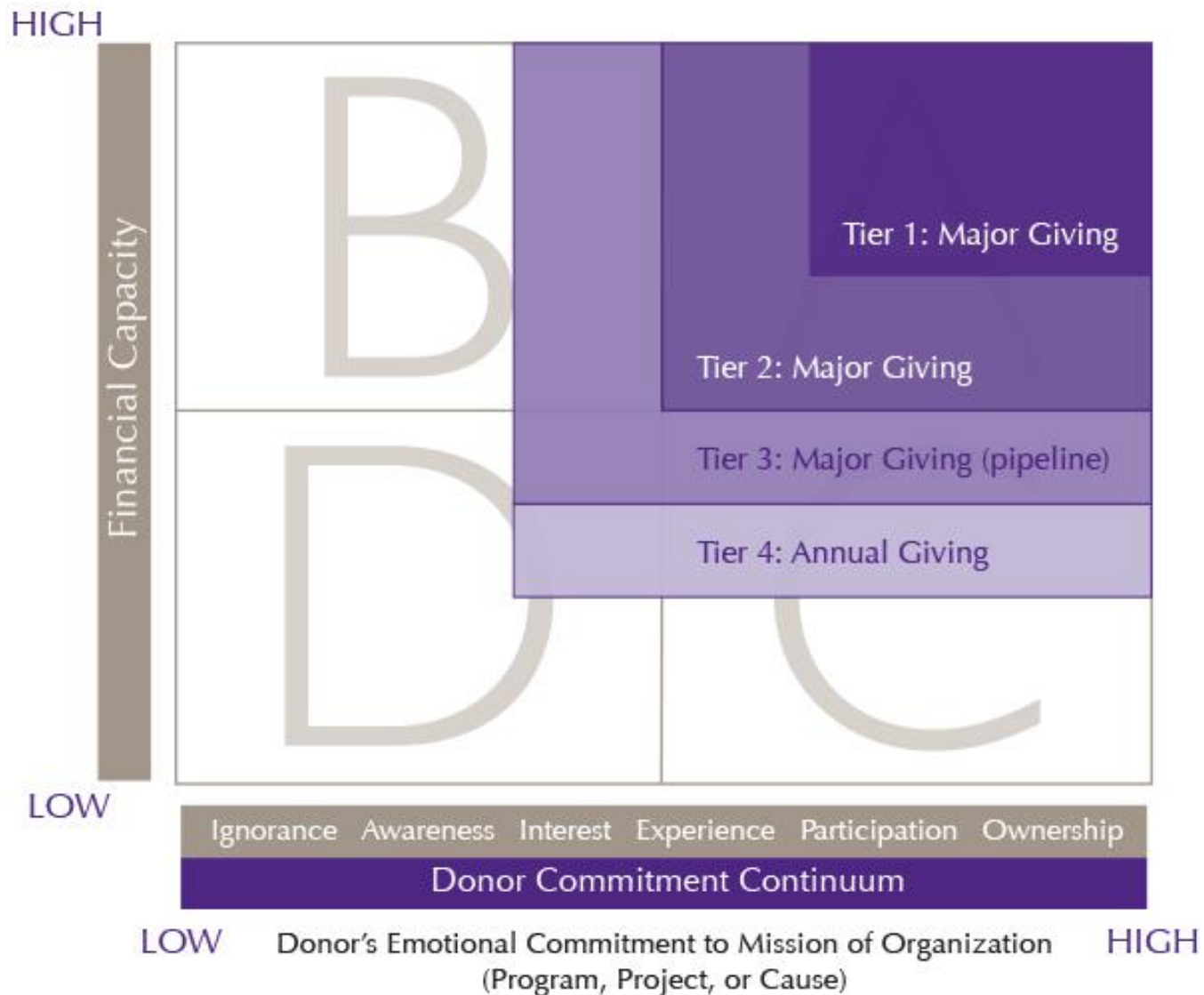
The Art & Science of Development

The Art & Science of Development

Ignorance	Awareness	Interest	Experience	Participation	Ownership
	They have a rough idea of the Grad School	Share the values Believe our cause is a good one May give small gifts	Have seen, heard, and/or felt the results of the Grad School's work Have attended one or more of our activities or events	Participate in a number of events or activities Take on leadership roles (such as Dean's Cabinet) Give time and money Trust the Grad School leadership	Thinks of Grad School not as "they" but "our" Considers the mission to be their own Seeks to educate others about Grad School Top philanthropic cause

Goal: 

The Art & Science of Development



The Tools of the Trade

Current Use Gifts



Endowed Gifts



Deferred Gifts



Building Your Case For Support

Building Your Case for Support

Me vs. We

Me – Attempting to direct gifts to the Graduate School

We – Enlisting Campus Collaborators to grow support for graduate students and programs across campus

Building Your Case for Support

Fundraising Initiatives Must Have's

1. What is it?

2. How much \$ is needed?

3. Why does it matter?

Building Your Case for Support

Graduate School Specific Fundraising Initiatives

Graduate Dean's Fund

Career & Professional Development

DEI Initiatives

**Graduate Student
Housing??**

Student Emergency Funds

Mental Health & Well-Being

Building Your Case for Support

Fellowship Fundraising

Endowed Fellowships

Dissertation Fellowships

Summer Research Support

Recruitment/Top Off Fellowships

Fellowship Accelerator

Provides full expected payout for the first 5 years, allowing the fund principal to grow

Dissertation Match

\$30K donation is matched with \$15K to provide a \$45K year long dissertation fellowship

Research Accelerator

\$5K donation is matched with \$3K to provide an \$8K summer award

Racial Justice Fellowship

\$12K donation is matched with \$12K plus dept. guarantees 5 years of full academic year support

Building Your Case for Support

Collaborative Fundraising Initiatives

The [Chancellor's Scholarship and Fellowship Challenge](#), announced in February 2021 by Chancellor Pradeep K. Khosla, provides a \$1 match per \$2 of gifts up to \$5,000,000 for eligible gifts to undergraduate scholarships, graduate fellowships, and health-related professional school scholarships through the close of the Campaign for UC San Diego.

The Campaign For UC San Diego



Building Your Case for Support

CASE STUDY: Collaborative Fundraising Initiative

UCSB's Fellowship Accelerator Program

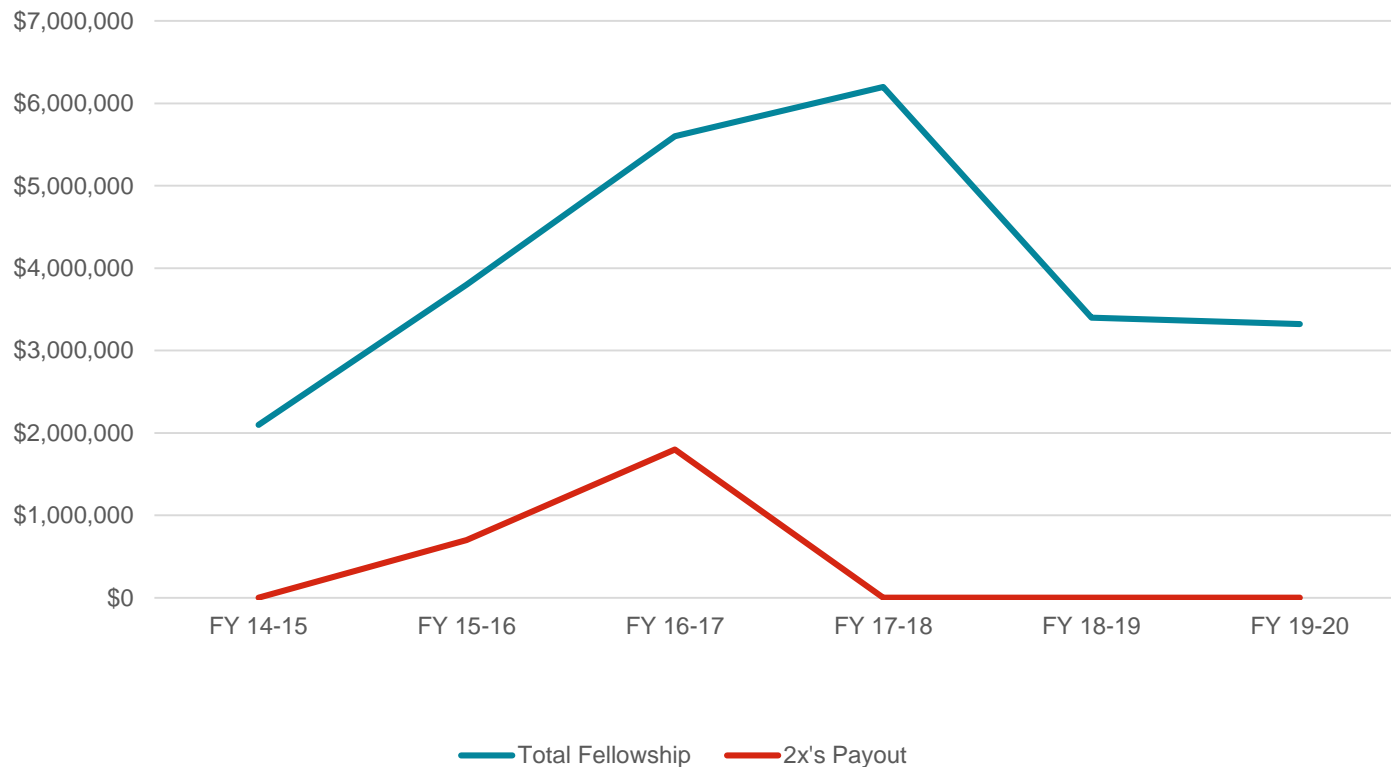
Program Features

- The Graduate Division will provide the full expected payout from gifts made to new or existing endowments for the first five years
- The Fund principal will grow substantially by reinvesting the investment gains over those five years
- Fellowship endowments in all academic areas qualify
- Gifts of \$50K-\$250K qualify for the Fellowship Accelerator. For gifts above that level, the first \$250K will be eligible.
- Funds are limited – the program will end once the available funds are exhausted

Building Your Case for Support

CASE STUDY: Collaborative Fundraising Initiative

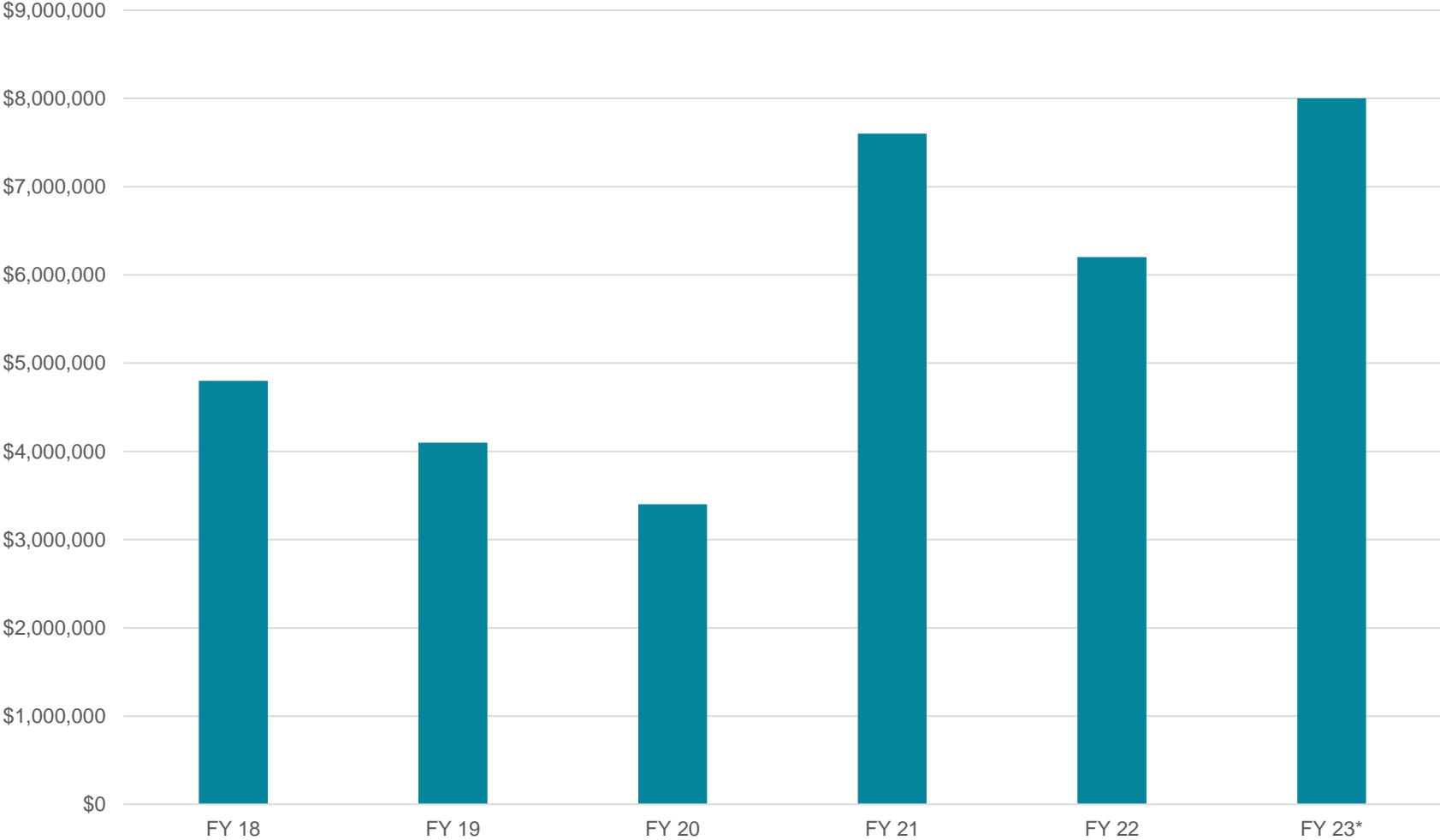
2 x's Payout Program (FY 15-16 & FY 16-17)



Building Your Case for Support

CASE STUDY: Collaborative Fundraising Initiative

Campuswide Support for Graduate Students



Building Your Case for Support

Lisa's Experience at Emory – Lessons Learned

1. Passion and Voice
2. Internal Environment – History and Culture
3. External Champions – Alum Leaders and Friends
4. Persistence and Patience

Executing Your Plan

Graduate Dean's Cabinet

Growing your Group of Advocates

Start with “Why?”

1. Source of Major Gifts
2. Vocal Ambassadors
3. Sounding Board for new Initiatives
4. Hosting Events & recruiting new donors

The Graduate Dean's Cabinet of the University of California, Santa Barbara advances philanthropic support for graduate education and the Graduate Division, and inspires members to serve as ambassadors for graduate education, its students and its programs.

On The Road Again...

Meeting with Donors – key questions



1. How much time are you willing to invest into meeting donors? Only local donors?

2. What types of donors are you willing to meet? Only Leadership/MG donors?

3. What role do you feel comfortable taking on?

4. How do you want to be briefed prior to the meeting?

Working with your Development Officer

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Your Development Officer revealed

“My dad goes to a lot of parties and has dinners with people that give money to UCSB.”

-Austen Lofthus (age 11)



Job Performance is measured on \$'s raised that specific year

Oftentimes have a deep connection to the university with many having gone to the institution as students

Working with your Development Officer

What you should expect – first meeting

1. Historical Fundraising #'s for the School
2. Current School Development Program Plan
3. Briefing on top 10-15 Donors/Prospects
4. List of current endowed funds
5. Assign Roles – very important*

Working with your Development Officer

What you should expect – ongoing meetings

1. \$'s raised FYTD (Grad School and for Grad Student Support)
2. Moves Management for Top 10 Donors/Prospects
3. Stewardship Activity
4. Upcoming Events

Questions?

Table Breakouts

1. Where is your graduate school in its fundraising journey?

2. Who are your closest collaborators? Who do you want to engage as collaborators?

3. What approaches can you use on your campus to increase connecting with existing collaborators and/or potential collaborators?

4. How can you use your vision for graduate education to promote philanthropy toward your most pressing needs? How will you use your vision and pressing needs to shape your case for development?

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