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

<table>
<thead>
<tr>
<th>Ignorance</th>
<th>Awareness</th>
<th>Interest</th>
<th>Experience</th>
<th>Participation</th>
<th>Ownership</th>
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</thead>
<tbody>
<tr>
<td>They have a rough idea of the Grad School</td>
<td>Share the values</td>
<td>Have seen, heard, and/or felt the results of the Grad School’s work</td>
<td>Participate in a number of events or activities</td>
<td>Thinks of Grad School not as “they” but “our”</td>
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<td></td>
<td>Believe our cause is a good one</td>
<td></td>
<td>Take on leadership roles (such as Dean’s Cabinet)</td>
<td>Considers the mission to be their own</td>
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<td></td>
<td>May give small gifts</td>
<td></td>
<td>Give time and money</td>
<td>Seeks to educate others about Grad School</td>
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**Goal:**

- **Ignorance:**
- **Awareness:**
- **Interest:**
- **Experience:**
- **Participation:**
- **Ownership:**
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**

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**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.
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

FY 18 | FY 19 | FY 20 | FY 21 | FY 22 | FY 23*

$0 | $1,000,000 | $2,000,000 | $3,000,000 | $5,000,000 | $8,000,000

UC SANTA BARBARA
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
Working with your Development Officer

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?