Development, Fundraising, and Alumni Relations

Fundraising has quickly become an important and expected component of chairing a department.

- Philanthropic giving in the U.S. is more than $300 billion per year.
  - ¾ of all giving is from individuals
  - Remainder from corporations, foundations, bequests.
- Critical to university budgets
  - Penn State endowments valued at $1.7Billion
    - Total budget is $4.3Billion

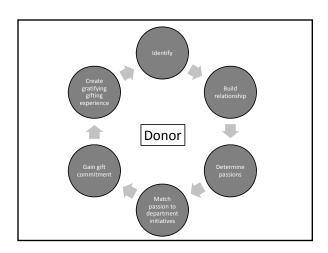There are a number of external and internal resources available.

The organization of development staff varies from one university to another.

- Penn State example
  - University, college, departments
- Within departments, some staff being hired for purpose of helping with development
- Alumni relations staff also get involved with development, particularly at the cultivation end.
  - Talk first about development
  - Then how alumni relations might help

Step 1. Get to know who your alumni are.

- Work with development staff to identify alumni who are potential donors.
- Query the alumni list for job titles, women, PhD's, location, …
- Meet with senior faculty and alumni to identify additional alumni
- Use your external advisory committee (assuming that they are mostly alumni) to help
  - Develop lists and a plan for visiting
    - Who are the high priorities?
    - Where are they clustered?

Step 2. Prepare for visiting your identified alumni.

- Develop materials you that showcase your department to give on your visits

Step 2 continued.

- Think about what is great about the department, where you are going, what initiatives you are working on, what you need to be successful
- Learn about each of these alumni
  - visit their websites, google their names, look on linked-in
  - Check development records for prior donations and records of contact

Step 3. Go visit!

- Go alone or with development person
  - Take faculty member(s)?
- Visit alumni wherever your travels take you
- Be prepared to talk about the department and the exciting things going on
  - Focus on the students
  - Give them the materials you prepared
- Arrange a luncheon for a group of alumni if many clustered together
  - See if one alumni will host
  - Present highlights of department

Step 4. Invite them to visit

- Speak in class, seminar, student group
- Help with canoe, bridge, …
- Visit with students, faculty
- Lunch with selected faculty and/or students
- Visit with others in the college that may be of interest

Step 5. Document the visits

- Document your conversations, and note their interests in the department
- Share with the development team
- Keep a notebook of visits for the next department head

Step 6. Ask for help

- Help comes in many forms
  - Funds for
    - Scholarships/assistantships,
    - student groups,
    - student travel,
    - Endowed lectures,
    - Endowed awards
    - Discretionary spending
    - Projects (EWB, concrete canoe, etc.)
  - Assistance in
    - reaching out to other alumni
    - setting up mentoring/network groups
    - Supplying data or other input to projects
    - Conducting field trips
    - ABET input
- So find out what your alumni are excited about

How can alumni relations help?

- Departmental alumni associations
- Speakers bureau
- Mentoring network
- All of these activities are ways to engage alumni, help your current students, and potentially lead to a gift

When should you ask for money?

- I rarely do!
  - If the alum brings it up, I follow up.
  - Development person usually follows up based on my report.

Create a good post-gift relationship.

- Thank you.
  – Card from department
- Annual report (accountability)
- Invitation to dinner with students
- Invitation to visit

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