Advancement 101
Part 2: Fundraising Essentials

Panel:
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Moderator:
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The Development Cycle 1.0

Identify

Steward

Research

Solicit

Cultivate
The Development Cycle 2.0

- Identification & Research
- Strategic Planning
- Cultivation & Engagement
- Philanthropic Investment
- Stewardship & Renewal
From the Donor’s Perspective

- Embracing Philanthropy
- Realizing Passions
- Considering Philanthropic Options
- Finalizing Decision
- Implementing Solution
Ways to Give

• **Endowment Gifts** – gifts of permanent funds which provide annual income most often for specific purposes.

• **Expendable Gifts** – gifts made for immediate use or use over the near term (usually over no more than 3-5 years)

• **Planned Gifts** – gifts made in lifetime or at death as part of a donor’s overall financial and/or estate planning.
Ways to Give, cont.

• **Restricted gifts** – gifts made with the intent of having funds serve a specific purpose.

• **Unrestricted gifts** – gifts available for the use for any purpose.

• **Other “ways”** – quasi-endowment; term endowment; dean’s discretionary funds; capital gifts.
Program Fundamentals

**Philanthropic Pillars**
- General Support
- Faculty Support
- Student Support
- Programmatic Support

**Fundraising Priorities**
- Core vs. Incremental
  - Operating Support
  - Chairs/Professorships
  - Financial Aid
  - Centers/Clinics
- Operating Support
- Chairs/Professorships
- Financial Aid
- Centers/Clinics

**Fund Types**
- Current-Use (CU)
- Current-Restricted (CR)
- Endowment (EN)
- Building (BR)

**Gift Costs**
- Any Amount
- Minimum Amount
- Specific Amount

**Fiscal Year Goal, 5-Year Goal**

**Target Audiences**
- Alumni
- Parents
- Friends and Widows
- Unaffiliated Individuals
- Corporations
- Foundations
- Faculty and Staff

**Prospect Segments**
- Retail Prospects
- Mid-Market Prospects
- Major Gift Prospects
- Leadership Gift Prospects
- LYBUNTS
- SYBUNTS
- Non-Donors

**Fund Raising Channels**
- Direct Marketing:
  - Mail, Digital, Phone, Crowdsourcing
- Peer-to-Peer Solicitation
  - Reunion, Class Agents, Law Firm Challenge
- One-on-One:
  - Dean, Staff

**Stewardship**
- Acknowledgements
- Giving Societies
- Annual Report
- Individual Reports
- Events

**Creating a Sense of Urgency: the Annual Fund and Campaigns**

**Staff /Dean Assignments**

**Personnel and Program Expenses**

**Program Metrics**
Building & Resourcing Your Team

- Institutional Comparative Analysis
- Resources
  - New and Reallocated
- Staff Structures
- Common Sense Hiring
- Metrics for all staff
Assessment of Priorities, Staff & Metrics for Success

• Questions we asked ourselves and our consultants:
  
  – **Development structures for US News (Top 30) Public and Private Law Schools:** What do they raise annually, what are their staff metrics, and what are their expenditures?
  
  – **Principal Gifts:** Of our peer schools, what schools consistently close at least one $5 million gift or more annually? What is the structure of their major and annual gift teams?
  
  – **Review of current peer law school campaigns – dollar goals and fundraising objectives:** What are their priorities, what is their endowment market value, how many living alumni do they have and how many alumni give?
  
  – **Capacity of prospects:** What is the capacity of our prospects compared to the capacity of other peer law school alumni prospects based on the consultants screening product?
Evaluation of Institutional Comparative Analysis

• What we learned that you can apply to your institution:

  – Creating short term and flexible long term staffing goals with our Dean, help manage the expectations of all involved in the transition.
  – More frontline fundraising staff = More of everything, good and bad
  – Reallocation of current resources means risky decisions with less predictable results
  – New metrics for current and new staff set the tone for achievement within one fiscal year
Suggestions for Building & Resourcing Your Team

• Understand your University Advancement and External Affairs resources. Assess if your resources are allocated correctly to achieve fiscal year and campaign financial goals.

• Invest in comparative data, wealth screening and individual wealth assessment data to fully understand the capacity of your prospects and determine assignments to staff.

• Review staff job descriptions, metrics and expectations annually. Review staff metrics with staff (and adjust) monthly.
Suggestions, cont.

• Articulate the project expectations and desired outcomes with the dean and subordinate staff.
• Understand that with new metrics and new or realigned staff positions, this will bring short-term instability to the office.
• Hire the most motivated, competent and likable people for open or new positions.
• Help staff transition to new expectations, or help them move on.
Navigating University Advancement

“One size fits one.”

– Public/private foundation president
Navigating University Advancement

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– Public/private foundation president

“Be an ally, but be your own champion.”
– Two-term dean
Navigating University Advancement

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“Be an ally, but be your own champion.”
– Two-term dean

“Be a guinea pig.”
– B-school dean
Navigating University Advancement

“Align yourself with high performers.”

–AVP/recovering law school DO
Navigating University Advancement

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“Don’t be a pain in the ass.”
– Current SVP
Navigating University Advancement

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“Be a pain in the ass.”
—Anonymous Midwestern dean
What CDOs Need from Deans
What CDOs Need from Deans

access

transparency
What CDOs Need from Deans

Candor

access

transparency
What CDOs Need from Deans

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access

transparency

TIME