

Fundraising for Graduate Education

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CGS 2009



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UNIVERSITY

Be The Difference.



Overview

- **Demographics of our University**
- **Fundraising for graduate education: internal and external audiences**
- **Fundraising 101**
- **Fundraising Best Practices**
- **Questions**





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Marquette University



Be The Difference.

- **Medium-Sized Private Catholic Jesuit University**
 - 11,633 students
- **3621 Graduate and Professional Students**
- **491 Tenure Track Faculty**
- **169 Full-Time Non-Tenure Track Faculty**
- **475 Part-Time Faculty**





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Marquette University


MARQUETTE
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Be The Difference.

- **10 Academic Colleges**
 - 38 Master's Programs
 - 17 Ph.D. Programs
 - 4 Professional Doctoral Programs
 - 39 Graduate Certificate Programs
- **Classified by Carnegie as a doctoral research institution with high research**



Fundraising Structure at Marquette

- **University budget is driven by student enrollment and enhanced by fundraising**
- **Development director in each college**
- **Regional development directors in the field**



Fundraising Models

Fundraising model varies by institution

- **Centralized**
- **Decentralized**
- **Combination**



Step One: Get a Seat at the Table

- **Fundraising should be driven by university's strategic priorities**
- **Get a seat at the table and share your strategic vision for the Graduate School**
- **Translate vision into concrete steps to achieving strategic goals → fund raising**

Whatever the model, graduate education should be its own priority!



Educate Your Audiences

Key Audiences:

- **Development: leadership and fund raisers**
- **Potential Donors**
- **Assume they know little or nothing about graduate education!**

“Graduate students – don’t they just sit around and drink coffee all day?”

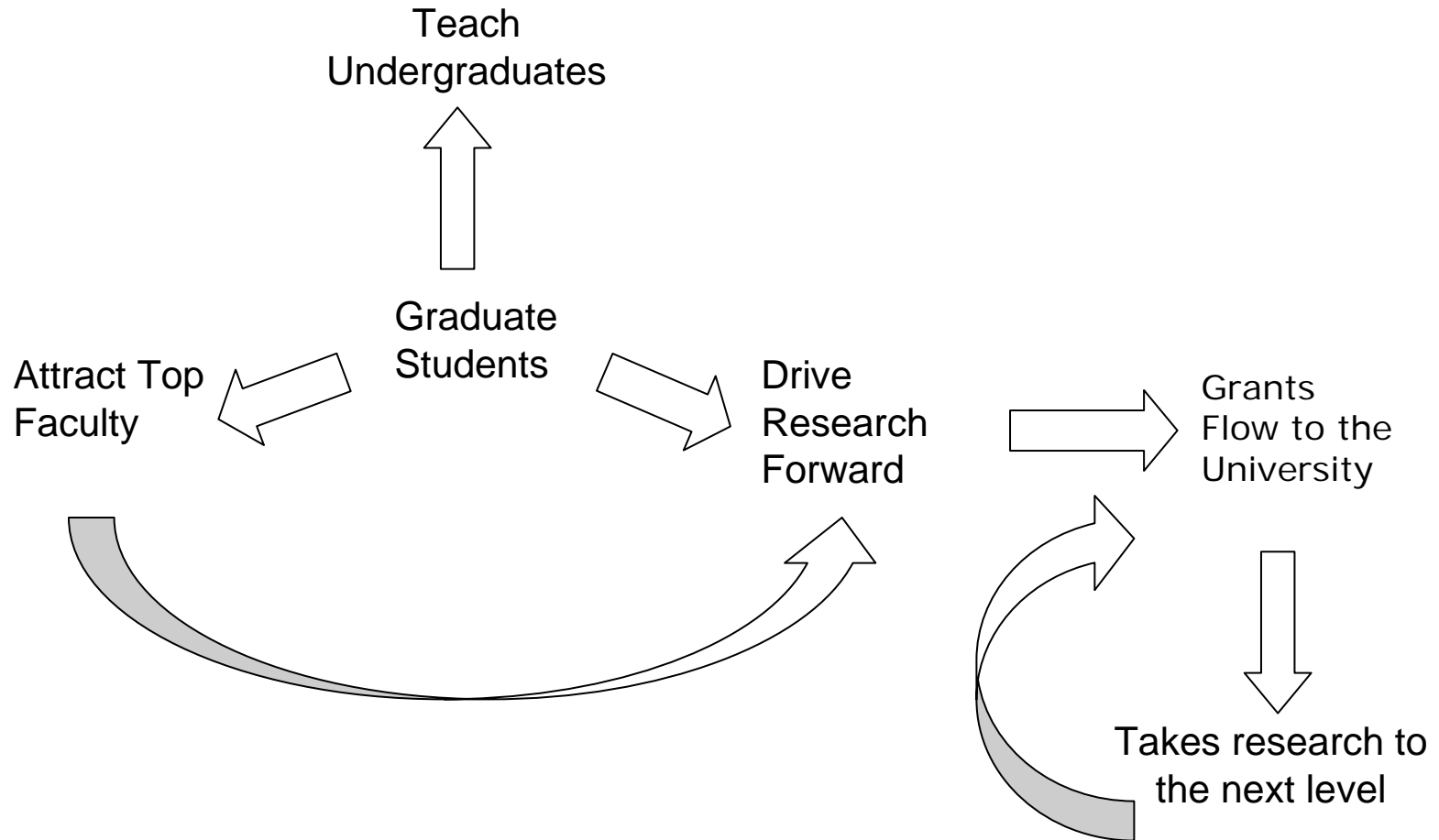


Educate Development

- **What is graduate education?**
- **The graduate school experience: not Undergraduate Education, Part II**
- **How to talk with graduate alumni – what will they want to know?**
- **“Market” for graduate students**
- **“Benefit” to the university**
- **This is also your story to tell to donors**



Graduate Students = Key to the Success of the University



Result: *Enhanced* national reputation for the University

Advanced Education

- **Interdisciplinary programs**
- **Pan-university graduate priorities e.g. research**
 - Example: Stanford Graduate Fellowships in Science and Engineering



Getting Started

- **Meeting with each academic dean**
- **Discussing turf issues**
- **Integrating and prioritizing fundraising goals for Grad School/each college/interdisciplinary programs**
- **Agreeing to work cooperatively**
- **Roles for Graduate School dean/school deans defined**

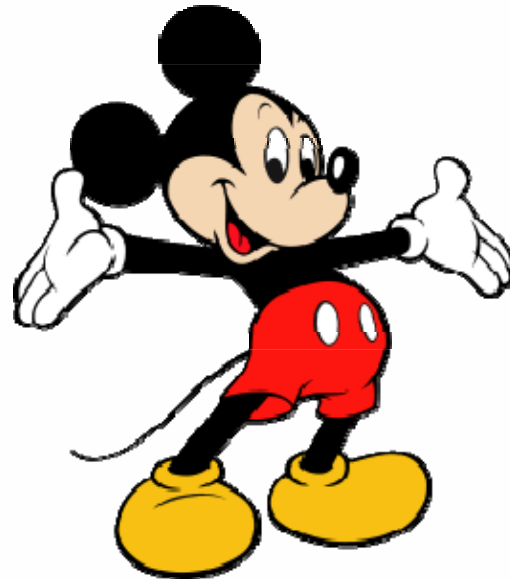


Evolution of Fundraising Structure at Marquette

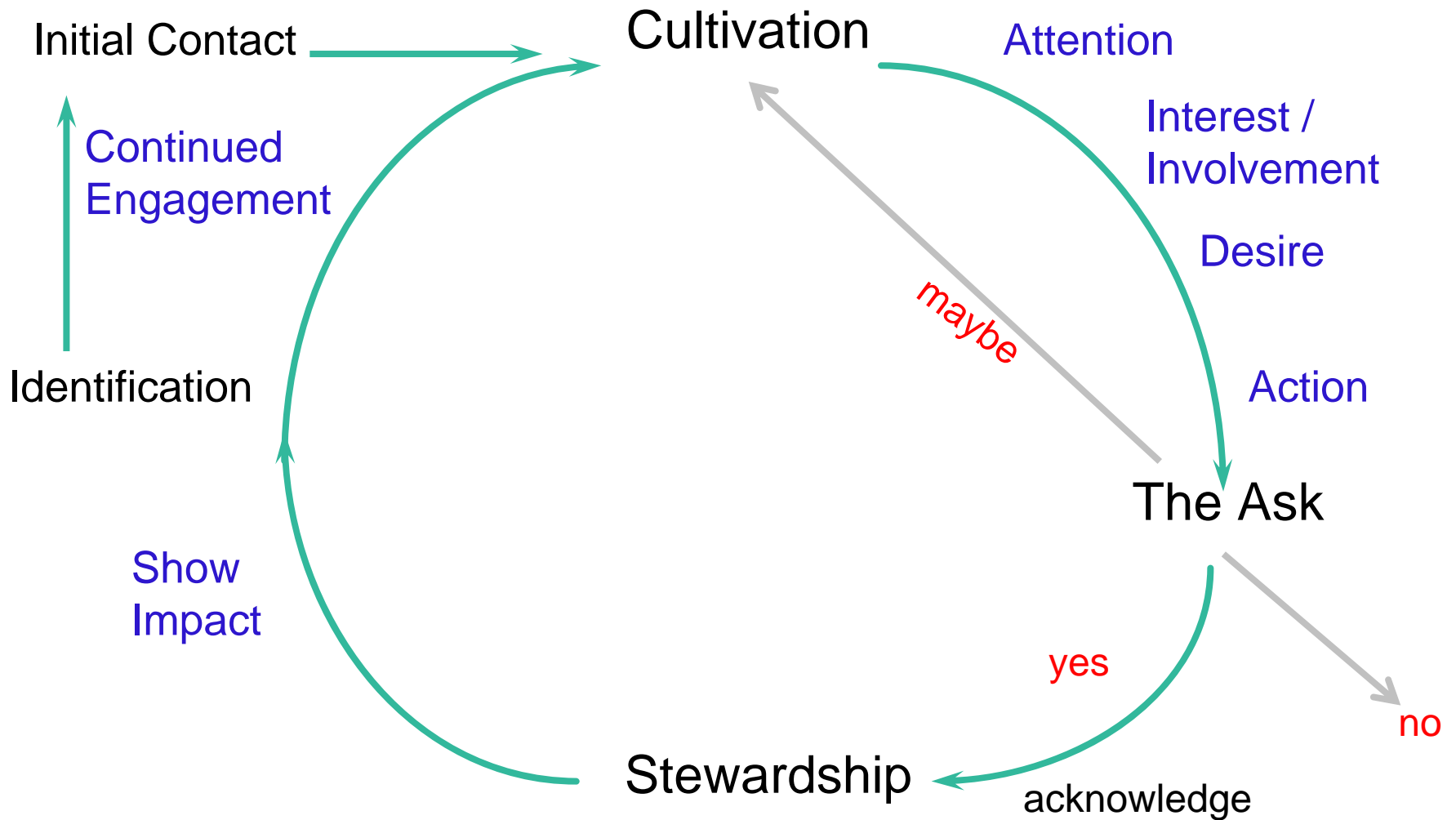
- **Shift from dedicated fundraiser for Grad School to embedding graduate fund raising within each academic college**
- **More donor-centric model**
- **Coordinator for development officers with graduate fundraising responsibilities**
 - Tracks prospects, serves as resource on graduate education/fundraising priorities



Creating a Philanthropic Culture



The Cycle of Successful Development



Fundraising 101

- **Annual Giving:** backbone of development, broad outreach fundraising for current use
- **Major Gifts:** out of assets, payable over several years, carry naming opportunities, often restricted.

Two types:

Current use: for immediate use, spent down

Endowment: in perpetuity – principal left intact and grown, investment earnings spent annually

- **Planned Gifts:** bequests, or gifts that provide income to donor during lifetime, revert to university once donor is deceased.



Campaigns

- First step: focus on strategic plans for institution's future, identify resulting priorities
- Campaign turns plans into reality by funding priorities

Campaign Math:

- 90% of \$\$ from 5-10% of donors
- Rule of thirds (top 10 gifts = 1/3 of goal, next 100 = 1/3, rest = 1/3)
- Determine # of gifts needed at each level (1 to 3 ratio but 1 to 5 if relationship doesn't exist)



Say Thank You!

- **Be donor-centric**
- **Show impact**
- **Personalize**
- **Retaining new donors a key**
- **Have a plan, execute consistently**
- **Coordinate with Development**



Targeted Fundraising

Annual Fund

- Tools: mail, phone, Web
- Separate graduate segments!
- Fund raising by department?

Case Study: Marquette University

- \$25K named current-use fund (stepping stone to endowment)
- GiveMarquette



Your true potential.
You found it here.



Give MARQUETTE

Why do students need scholarships?

How does MU benefit from scholarship aid?

Can scholarship aid reflect my passions?

Scholarship aid isn't important; it's vital

By Dr. Bill Henk, Dean, College of Education. Students represent the lifeblood of any great university, and Marquette is no exception. They are our essential reason for being. Unfortunately, in these challenging economic times, many of our remarkable MU students face the prospect of delaying or terminating their education here....

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By the Numbers

TAKE ACTION

DONATE TO SUPPORT STUDENTS

JOIN GIVE MARQUETTE

TELL US YOUR STORY

SPREAD THE WORD

TELL US WHAT YOU THINK

Do you use the social networking Web site Facebook?

- Yes, I log in daily
- Yes, but I don't really use it
- No way! Not my thing.

View Results

VOTE

Facebook user? Join the Give Marquette group on Facebook!

I stand on the shoulders of giants; everyone helped me get where I am and everyone expects





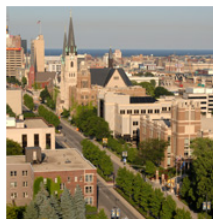
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News: MU accepting applications for Business Plan Competition

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- Parents
- Faculty & Staff
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- Admissions
- Majors & Programs
- About Marquette
- Research & Scholarship
- Athletics
- Careers
- Giving to Marquette

GIVING

MU Connect: Giving



Please indicate the amount you wish to donate, select a designation and click "Add Donation." Repeat these steps as needed to split your gift between multiple areas of support.

*Indicates a required field

GIFT AMOUNT(S) AND AREA(S) OF SUPPORT

* Amount: \$

Designation: **Scholars Fund - Graduate School**

Add donation

HOW WE USE YOUR GIFT

- The true cost of education
- Research
- Service to others
- Scholarships
- Questions about giving

GIVING

- Why give
- Giving options
- How to give
- Donor profiles
- Careers in advancement
- Contact us



Why Give

You can help in so many ways: scholarships for bright students who could not afford a Marquette education on their own, support for programs that help students explore their faith, and so much more. [Learn more about how your gift makes a difference.](#)

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Endowment

- **Giving opportunities keyed to graduate financial aid vehicles**
- **Calculate assumed % annual payout (5% is typical)**
- **Basic price points afford flexibility**
- **Set a minimum endowment level**



Marquette University Endowed Graduate School Financial Aid Giving Opportunities

Teaching and Research Assistantship

A named endowment fund that supports a teaching or research assistantship for one graduate student, including tuition and a stipend.

- \$700,000 fully funds one assistantship
- \$350,000 funds a partial (50%) assistantship



Marquette University Endowed Graduate School Financial Aid Giving Opportunities

Dissertation Fellowship

A named endowment fund that provides a one-year award to enable a graduate student to complete the dissertation.

- **\$700,000 fully funds one fellowship**
- **\$350,000 funds a partial (50%) fellowship**



Marquette University Endowed Graduate School Financial Aid Giving Opportunities

Graduate Endowment for Excellence

A pooled fund that provides tuition support for promising students, travel awards for students to attend conferences, and stipend increases to make our aid packages competitive.

- Naming opportunities within this fund begin at \$50,000.**



Fundraising for Endowment Best Practices

- **Fewer restrictions the better!**
- **Think carefully about naming levels**
- **Naming opportunity – not primary reason donors give**
- **Donor as investor**
- **Don't take a gift if it doesn't fit into your university's priorities!**



Going into Campaign?

- **Strategic planning – come to the table**
- **Describe your vision, tell your story!**
- **Get on the priority list**
- **Make clear that fundraising is a priority for the graduate dean**
- **Offer to go on donor calls with Development**
- **Define the dean's role on Development team**



Making the Case in Writing

- **University/school/dean strategic plan for graduate education**
- **Don't frame case in terms of need (rather in terms of strengths and possibilities)**
- **You don't need a glossy brochure – personalized cultivation**



Communicate Stories with Potential Donors

- **Tell Stories of Impact**

- What is their current employment?
- Why did they choose the university?
- What financial aid did they receive?
- What was the impact on their lives?



Name: **Jill Gershan**
Location: Fox Point, WI
Degree: Ph.D., 2000
Program: Biology
Employment: Senior Research Associate, Medical College of Wisconsin

Choosing Marquette:

I chose to pursue my graduate work at Marquette because I was attracted to a smaller more interpersonal department, there was a diverse choice of study, and there was guaranteed financial support provided either from teaching assistantships or competitive fellowships.



Financial Assistance:

I found the teaching experience to be invaluable in fostering mentoring relationships and building public speaking confidence, and I was fortunate to receive both the Raynor and Schmitt fellowships that enabled a concentrated research effort.

Impact:

My education at Marquette primed me for my current role as a cancer research scientist in an academic cancer center. Upon graduation, I was prepared to excel as a post-doctoral scientist conceptualizing and implementing experimental designs and writing scientific papers. With this foundation, my career progressed to a scientist role with grant writing responsibilities.

As a successful scientist working in an academic institution, the doctoral graduate program in biology at Marquette University has proven to be a great choice for me.



Name: **Robert C. Helmer**
Location: Sylvania, OH
Degree: Ph.D., 1998
Program: Religious Studies
Employment: President, Lourdes College

Choosing Marquette:

I chose Marquette University for its reputation as a Jesuit school and as having a Theology Program with high quality faculty.



Financial Assistance:

I received assistantships and fellowships throughout my time in the program. Because of the aid I received I was able to focus more intently on my studies and I was able to complete the program in a timely fashion.

Impact:

The interaction with the Marquette graduate faculty, in particular Julian Hills, John Schmitt, Deirdre Dempsey, and Pat Carey, not only sharpened my ability to think critically but also instilled in me a sense of higher education as a true community of learners. Each of them shared freely of their time and expertise both in and out of the classroom. Each of them approached their areas of interest with a deep sense of curiosity, something I have carried forward into all areas of my current work.

Being a college president, I do not have the time available to me to engage in the kind of scholarly research for which I was trained by Marquette's talented faculty. But I do utilize the same critical methodologies in the various areas of my college. My time at Marquette has not only impacted me, both personally and professionally, but an entire college as well.



Name: **Melissa Huerta**
Location: Chicago, IL
Degree: Master of Arts
Program: Foreign Languages and Literatures
Employment: Ph.D. student and teaching assistant,
University of Illinois



Choosing Marquette:

I chose to attend Marquette University for Graduate School because I wanted to be closer to my family and to the Milwaukee community. Also, the teaching opportunity that the Department of Foreign Languages offered and provided was a huge factor in my decision to attend Marquette University.

Financial Assistance:

I received a teaching assistantship during the two years I was there. Without the assistantship, I would have had a difficult time completing the program because I would have needed a full-time job to pay for the graduate courses; as a result I would have not completed the program in two years.

Impact:

All of the professors and instructors I worked with were exceptional and we had great rapport both professionally and personally. During my time at Marquette, I met and worked with exceptional people and to this day remain in contact with them.



Name: **Kerry McDonald**
Location: Columbia, MO
Degree: Ph.D., 1992
Program: Biology
Employment: Associate Professor, University of Missouri School of Medicine

Choosing Marquette:

I chose Marquette University because of its strong Biology Department and I was very interested in working in the area of muscle/exercise biology. The department offered strength in muscle biology and I was hoping to be able to work with Dr. Robert H. Fitts, a renowned expert in the field of muscle/exercise biology.



Financial Assistance:

I started in the department on a teaching assistantship, which offered an excellent opportunity to teach biology to undergraduate students. I still use some of the laboratory exercises and methodologies that I learned in those classes for my courses and in my research laboratory. The stipend was of utmost importance in providing a means for housing and board.

I was granted two years of pre-doctoral research fellowships and was fortunate to receive a Rev. John P. Raynor Fellowship. Without question, these assistantships and fellowships were paramount for a successful graduate program. The productivity of my graduate work, supported by the fellowships, allowed me to be competitive for top-notch post-doctoral positions and set the stage for attaining my current faculty position in a medical school. It was these assistantships and fellowships that made Marquette University very competitive and even decisive in my choice of a graduate program.

Impact: During my graduate career, I learned the skills necessary for all phases for this career- lab bench work, grant writing, teaching, peer review, interpersonal skills and time management.



Name: **John Wang**
Location: Milwaukee, WI
Degrees: Ph.D., 1992; Master of Science, 1987
Program: Civil and Environmental Engineering
Employment: Founder and President, Midwest Structure Engineering, Inc.

Financial Assistance:

I worked for two years as a teaching assistant followed by two years as a part-time instructor. The program gave me a chance to help fellow students while receiving funds to continue my own education. My professors, advisors and other faculty members provided me with a truly comprehensive education, none of which would have been possible without the financial support that I received from Marquette.



Impact:

I stepped into a life-changing journey at Marquette University. As an international student, I not only struggled with academic challenges but also challenges of living in a completely different culture. However, through one-on-one interaction with professors I received both detailed training and individual care as they went out of their way to ease the transition. The professors worked with me as a friend, patiently teaching me everything from engineering theories to social essentials. The religious background was also very important, teaching basic morals and a sense of ethics.

The years I spent at Marquette no doubt helped me reach where I am today. I will forever be thankful for the professors that inspired me to be a better student and a better person; and a school that provided so many opportunities. Fifteen years later, I continue to build my career upon the firm foundations that Marquette provided me.



Whom Do You Ask?

- Graduate alumni
- Grad alumni now in other fields
- Entrepreneurs
- Parents
- Loyal donors with interest in a particular subject
- Look to your faculty – strong relationships with key alumni!
- Research – connections with industry



Who Asks?

- **Be a team player – work with Development**
- **Donors want to hear from faculty, deans, president**
- **Bring a stellar graduate student or department chair**

Fund raiser should:

- **Use your time judiciously (for major prospects)**
- **Prepare you for visit: background, meeting goals, your role**



Should We Have A Graduate Fund Raising Board?

- **No advisory board/advice on curriculum**
- **If yes, no “dog and pony show”**
- **Engagement without board: peer review, referrals, solicitation**
- **Need overall engagement plan**
- **Engagement platform: new alternative to boards**



Engagement via Events/Participation

Invite prospects/donors to:

- **Attend existing campus events, e.g. speaker series, basketball games**
- **Share their expertise, e.g. guest lecture**
- **Network (Example: Marquette CIRCLES)**
- **Learn about/celebrate exciting research at your institution (Example: Research Scholars Reception)**



Characteristics of Engagement Platforms

- Offers shared value to participants
- Solves a shared problem or challenge
- Creates opportunities to raise “engagement money,” leading to major gifts, which lead to endowment
- Provides unique insight into University’s expertise
- Widens participants’ network with key individuals related to their sector
- Led by a base of dedicated faculty and volunteers
- Seen as a resource by industry or community groups
- Brings wider, more differentiated prospect base into University family

Example: Center for Real Estate, Golden Angels Network



What About the Economy?

- **Don't assume donors can't give, but be sensitive**
- **Great time to engage, cultivate**
- **Scholarship is strong ask now**
- **Bridge funding – help for current students**



Summary/Takeaways

- **Make case for targeted Graduate School fund raising**
- **Cycle of giving**
- **Team approach**
- **Create a culture of giving at your institution**
- **Don't wait – cultivate!**
- **You are an ambassador for graduate education**
- **Anyone is a potential donor**





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