

# Fundraising and the Use of Advisory Boards

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UNC  
THE GRADUATE SCHOOL

# Fundraising Fundamentals

- Establish a case statement and academic goals for fundraising
  - ✓ A few well articulated goals
- Overall development plan
  - ✓ Establish an Advancement Board
  - ✓ Plan for major giving
  - ✓ Plan for annual giving
- Developing other critical relationships
  - ✓ Partners in your goal/vision
- Stewardship



# Vision and Case for Support

- Clear Statement - How graduate education adds value
  - ✓ This varies depending on the audience
- Well articulated priorities/goals
- Specific funding needs to reach goals
- Why 'donors' should care
- Results that will occur with sufficient support



# Talking Points

- Social value of a graduate education
- Economic value of a graduate education
  - Graduate students make it possible to attract external funding; job creation; economic multiplier
- Institutional reputation is related to quality of graduate programs
- Tuition remission for out-of-state students
  - Funding our doctoral students
- Value of providing graduate education for out of state students
  - Graduate School is not subject to out-of-state enrollment caps



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# Academic Goals at UNC-Chapel Hill

- Attract high quality students by competing nationally/internationally for the best students
- Provide support for all first year students
- Minority student recruitment/support
- Interdisciplinary graduate education
- Support students' timely progress to degree



# Strategies Employed at UNC-Chapel Hill

- Monthly development meetings
  - Review the past month
  - Discuss future events
  - Develop strategies
- Graduate Education Advancement Board
  - Specific for UNC-Chapel Hill
- Relationship with UNC legislative liaisons
  - State level
- Visibility with the Board of Trustees
- Networking





# Internal and External Constituents

- Public institutions must educate & influence a wide range of stakeholders/constituents
  - Internal constituents include:
    - Chancellor/President
    - Board of Trustees
  - External groups include:
    - Board of Governors for UNC system
    - State General Assembly (Senate and House)
    - Governor
    - Private enterprise
    - Public
    - Alumni



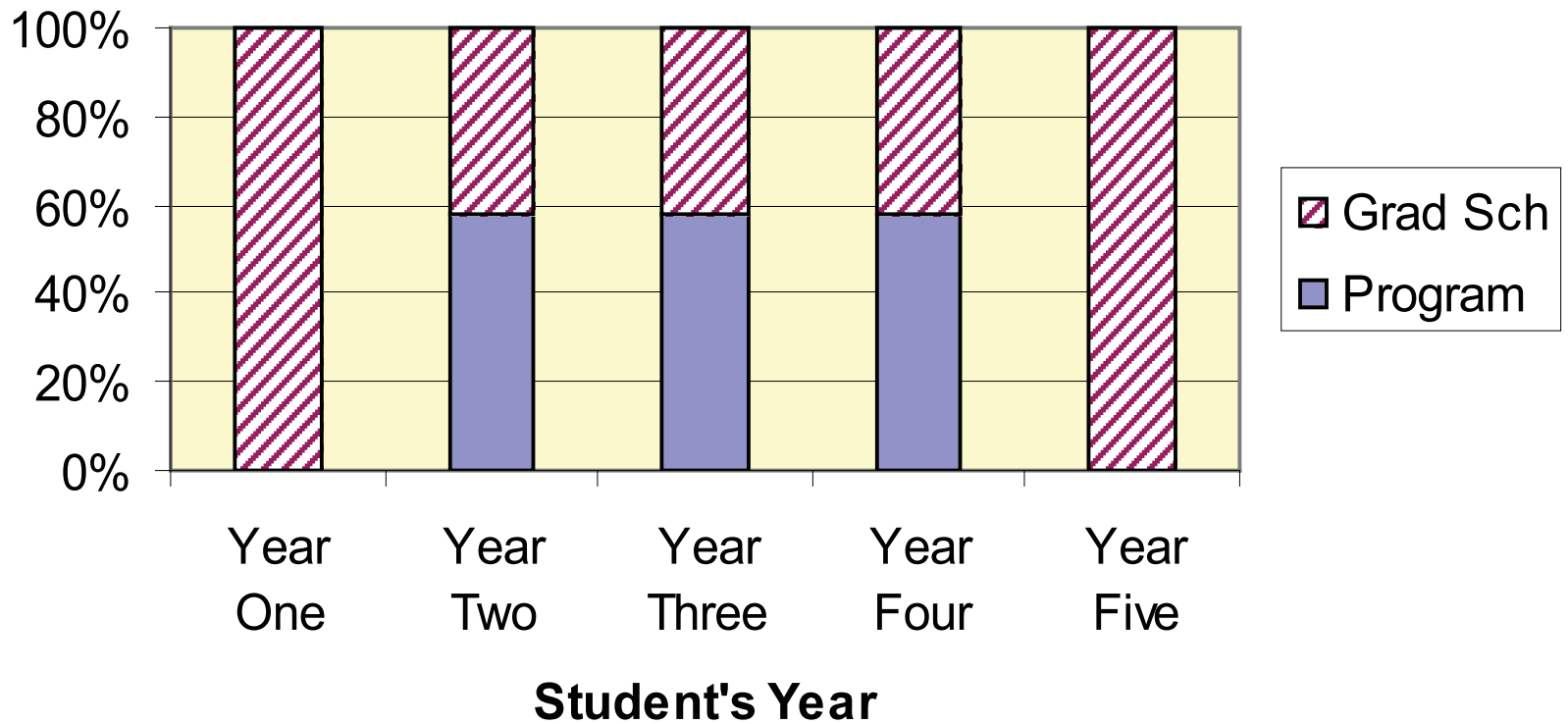


# Major Giving Opportunity

- Donor goal – make a significant impact on the University and graduate education in perpetuity
  - Interest in establishing a program that would transform graduate education
    - Worked with donor during all phases of establishment
- Royster Society of Fellows
  - 5 years of support – 2 nonservice years
  - Stipend, full tuition & fees, HI, travel
  - Interdisciplinary learning society
  - Ambassadors / leadership
  - Endowed professor to oversee program



## Financial Contributions Toward Stipends: Society of Fellows 5 Year Model



# Royster Society Impacts Academic Goals

- Attract high quality students/support for all first year students
- Minority student recruitment/support
- Interdisciplinary graduate education
- Support students' timely progress to degree



# Interdisciplinary & Timely Progress Goals

- Donor Goals – direct & significant impact to one or a few students
  - \$500-700K to endow 1 fellowship
  - Support for summer fellowship program
- Dissertation Fellowships
  - 1 final year, stipend, tuition & fees, HI, travel
  - Reward for excellence, enables quality, timely completion
  - Interdisciplinary learning society



# Stewardship - Critical

- Appreciation
- Information on the good outcomes resulting from their gift
- Recognition of donor



# Graduate Education Advancement Board

- Mission
  - The Graduate Education Advancement Board assists the Graduate School and the University in generating broad support and funding for graduate education at UNC-Chapel Hill
- Membership
  - Community/state leaders with an interest in supporting graduate education
  - Significant donors contributing to graduate education
  - Legislators
  - Alumni in leadership positions



# Put the Advancement Board to Work

- The GEAB at UNC-Chapel Hill meets twice each year
  - Work to achieve a balance between social activities and education/work
- GEAB members are asked to host alumni events at various locations
  - Try to do two of these each year
  - GEAB support reduces our cost
- GEAB members with special expertise work on projects with the Graduate School
- Graduate School staff are always available to advise the public officials on the board
  - Contacted by legislators for information





# Working with the Board of Trustees

- Attend bi-monthly BOT meetings
  - Visibility is important
  - Raise issues of importance for graduate students
- Organize an annual lunch with BOT and faculty focused on graduate education
- Former trustees appointed to the GEAB
  - Continues their contact with university and graduate education; they are influential
- Networking at university events
- Invitations to major Graduate School events
  - Graduate student recognition ceremony
  - Hooding ceremony at commencement

