

FUNDRAISING TIPS FOR DEANS WITH INTERMEDIATE DEVELOPMENT PROGRAMS

*Donald J. Weidner**

INTRODUCTION

SIXTEEN years ago when I became Dean, Florida State University College of Law had an alumni giving rate of 5%, no endowed professorships, two chairs, and an endowment slightly in excess of \$4 million. Today, we have an alumni giving rate of 26%, twenty-eight endowed professorships, three chairs, several major unrestricted endowments for excellence and total endowment slightly in excess of \$28 million. In recent years, we have been averaging annually a little over \$2 million in cash plus an additional \$1.5 million in commitments. This paper tells some of the steps—and missteps—we took along the road of this gratifying progress.

We have a very small development office. We started with one development officer and one full-time support staff member. We now have an Assistant Dean for Development, a Director of Annual Fund and Alumni Affairs, one full-time support staff member and many part-time student assistants. We are about to add a second full-time support staff member. Our law school does not have its own foundation. We work with and through the Florida State University Foundation, which pays for the Assistant Dean's position and is soon to contribute to the Director position. The Assistant Dean reports jointly to me and to the Foundation. Although some law deans think it is important to have the law school's own foundation, I have no problems with our relationship with the University Foundation. The Foundation helped me hire a terrific Assistant Dean, and we all agree that his overarching task is to be the law school's major gifts officer. Our fundraising efforts are enhanced by two full-time communications staff members, both of whom write and design our magazine, web pages, press releases, student recruitment and other communications.

Before diving into the specifics, I offer one broad philosophical point. A dean must leverage the dean's investment in fundraising. The investment is both the time and the money you spend on fundraising and your opportunity cost. You need to maximize the return on development officers, faculty, students, and major donors. If you have a great song, you cannot be the only one singing it. With respect to law firms, some people employ a taxonomy that distinguishes

* Dean and Alumni Centennial Professor, Florida State University College of Law. This paper is based on Dean Weidner's remarks at the 2007 Jackson Hole IX Deans Development Conference sponsored by the ABA Section on Legal Education and Admissions to the Bar.

among lawyers who are either finders, minders, or grinders. In a college, the dean is torn many different ways. The dean should not be the sole fundraising finder, minder, or grinder. The dean, to use Covey's language, should not "get caught up in the thick of thin things." The dean needs others to leverage the dean's expertise. The dean needs to have a dynamic network of people who are finding, minding, and grinding on the school's behalf. This theme will play out in many of the specific points that follow.

SOME SPECIFIC STEPS AND MISSTEPS

Carefully select your development officers, especially your top person. To effectively represent you and the school, your development officer must be a highly informed and capable institutional insider. You must be prepared to pay enough to hire a person who will be able to speak both for you and the institution, and to deploy others on behalf of the institution, consistent with institutional policy and without constant prior consultation. An agent needs delegated authority to be effective. Avoid one pitfall I have run into over the years—realize that many people who seek and hold jobs as fundraisers do not want to leave the office. Your top person especially should be someone who will regularly and cheerfully get on the road and get you on the road.

Set clear expectations for your development officers, especially with respect to getting you on the road. Major gift fundraising requires house calls. You must go to a prospective donor's community—to the donor's home, office, club, boat, or art gallery. I live in a small town in a relatively unpopulated part of the state. Even though most of my alums are in Florida, I have to travel, and often fly, to see most of them. I have made it clear to my Assistant Dean that I want to be on the road at least two days every other week and to have development lunches in town on at least three out of every five days that I am in town. I expect to work with one if not both of my development officers on a daily basis.

Make clear to faculty that they are as critical to the successes in fundraising as they are to the school's academic successes. Make clear that you need their involvement both in annual giving and in major giving. Neither current students nor alumni tend to give because of who the dean was or is. They tend to give because they were touched by their classmates or by individual faculty. Alumni tend to give because of their gratitude for the way they were treated by specific faculty members. Even the most hardened senior litigators wax eloquent about the way they were inspired or treated by their favorite professors back when they were students. Faculty must appreciate that the Dean recognizes their importance. The more you become a successful fundraiser or otherwise an "outside" dean, the more important it is for the faculty to see that you approach your job with humility and with a sense of their importance.

Solicit your current students as part of your annual fund campaign. This past year at Florida State, 65% of our students made cash contributions to the law school. For years, I shied away from soliciting our current students. My fear was that a small minority of students would lash back at the solicitation with a public litany of demands that must be met before they would contribute one penny. In short, for years I gave a veto to imagined hecklers. No more. I

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became confident that the students love the faculty and the school. We have now been soliciting our current students for five years, and I wish I had started doing it sooner. Our giving rate has increased every year. Our student drive lasts one week during the spring. The students contribute because the faculty (in addition to the dean and student leaders) urge them to. The most persuasive urging takes the form of challenge gifts from the faculty before their students. For example, some faculty members promise to contribute \$5 for every student in their class who contributes at least \$5. Others agree to contribute \$1 for every member of the student body who makes a contribution. The faculty challenges are listed and circulated widely. Lists of student contributors are published before the student drive ends.

Link the student giving rate to the alumni side of the annual fund. We ended our student drive on a Friday and that afternoon I sent an email to all our alumni announcing that 65% of our students had just made a cash contribution to the law school. On Monday, we began our spring phonathon asking our alumni to join in the enthusiasm and generosity of our current students. The student giving rate tells the alumni volumes about the students' satisfaction with their law school experience.

The key to our successful alumni giving rate is a phonathon that uses our own students as callers. For many years, we tried everything in our power to make a "class agent" program work. We had heard and read that class agent programs were most effective in professional and other schools with small class sizes in which the students all know one another. We prepared lists of classmates with contact information and giving history and prepared packets and discs and trained the alumni. We kept in constant contact with the class agents and tried to remind and to encourage the class agents without browbeating them. We had limited success. Most of the people who enthusiastically agreed to be class agents simply did not make many phone calls. When we first tried to run a phonathon, we turned to the one run by our central University Foundation. Even though we prepared scripts for the undergraduate students who were used as callers, it was not very effective. All our success has come from bringing our phonathon completely in-house and using our own law students as callers. We have three weeks of students calling in the fall and another three weeks of students calling in the spring.

Acknowledge the larger phonathon gifts by telephone. I personally sign a thank you letter to every annual fund donor. I also try to personally telephone every annual fund donor who contributes \$500 or more. I also have an alumni committee telephonically thank every annual fund donor who gives \$250 or more. To emphasize: if you give \$500 to our law school's annual fund, you get a letter and phone call from the dean and a phone call from another alum.

We use all our successes to motivate other successes. We use our successful student giving rate to encourage the alumni we call as part of the phonathon and we use our overall successful giving rate to motivate our major donors. Major donors care about annual giving. They know that most others cannot afford to give at their level; however, they do expect to be part of a larger effort of many enthusiastic people who are giving according to their means.

Manage your own alumni database. You cannot raise much money or have many donors if you do not know who your alumni are and how to contact them. Early on, we realized that we had to run our own alumni database. Our alumni represent too small a percentage of the overall University alumni to expect much attention. We in the law school have also placed much more emphasis on annual giving than our University Foundation, which has been more oriented toward current capital campaigns. Keeping the database current is a long and unending process, but it pays great dividends. Also, realize that nationally, schools and colleges lose contact with their graduates as they cross the stage and are handed their diplomas. Have all units of your operation—academic affairs, placement, and development—coordinating information intensively, especially during the first few months after your students graduate. We use Blackbaud's development software and like it. The University permits us to go our own way in part because we have by far the best alumni giving rate on campus. Our central Foundation now uses Blackbaud and we are happy with that.

Because all giving is personal, put major gift prospects into direct contact with faculty members and with students. Our Assistant Dean for Development has been invaluable in this respect. For example, if you have a lunch in which a prospect mentions Professor X with affection, mention Professor X in the follow through correspondence with the prospect and copy Professor X on that correspondence. If the prospect would like to be a speaker in Professor X's class, pass along that message in the letter. If a speaking invitation is not likely to ensue, mention an alternative. We have come up with the device of the "Networking Nosh"—our Placement Office arranges box lunches for alums to share with groups of ten or twelve students most interested in the alum's geographic or professional area.

I think the best thing I ever did for our development operation was to create a Board of Visitors as a supplement to our law school Alumni Association. Initially, this forty person group was half alumni and half other opinion leaders in the legal profession. As our program has matured, this Board is almost entirely our own alumni who have either made a major gift or have said they plan to make a major gift in the future. We invite people to membership for three year terms and tell them this is a group of our major financial contributors. If an invitee asks what is expected of them financially, we say an immediate gift is not necessary, but that everyone on the Board either has made or intends to make a gift of \$100,000 or more.

Make Board of Visitors meetings interesting for the Board Members. Structure occasions to listen to Board Members. Heavy hitters do not like to be lectured. They like to have their opinions sought. We begin with a Sunday evening cocktail party that is followed by a fairly formal dinner with faculty. The seating at dinner is critical, and careful matching of faculty with Board Members, and Board Members with one another, is most important. At the dinner, we try to structure a discussion from the floor, perhaps in response to a presentation of a Board Member, in which the Board Members get to share their opinions. The next day, after a short report from me on one particular topic at a breakfast meeting, we spend the bulk of the day having Board Members make presentations in class or to groups of interested students. Both during Sunday

evening and Monday morning, we are trying to match individual donors and prospects with the students and faculty we are asking them to support. At lunch, we typically have a presentation by a Board member. These meetings have been extremely well received and I think they are central to our major gift cultivation and stewardship efforts.

Acknowledge major gifts in ways that are meaningful to the donors. One of the more distinctive things we do is commission an oil portrait of every major donor or someone the donor wants to honor. This is extremely effective. Many donors very much appreciate this touch. The portraits also tend to enhance the sense of tradition within our relatively young school. They also advance the overall culture of philanthropy. Students know what the portraits are about, and many of them tell us they intend to have their portrait “up there some day.” Donors especially like either alumni-spouse portraits or parent-child portraits if both are alumni.

Use your major donors to thank every new major donor. We send a personalized email to each major donor requesting that he or she personally thank, either by letter, email or telephone call, each new major donor. We also ask our University President and Provost and the entire faculty to contact new major donors and thank them.

Report back to your donors on the impact of their philanthropy. Our University Foundation helps us prepare and send a written annual report to every donor who has created an endowment explaining the status of the endowment and what has been done with earnings during the year. If the endowment is for scholarships, we report the number of scholarships awarded and indicate the recipients (we also try to get each recipient to thank the donor). If the endowment is for a professorship, we send a short report of the professor’s activities for the year as well as a current resume listing the professor’s recent publications and presentations.

Structure endowed professorships such that they are meaningful to the donors and make a significant difference in the life of the school. We use the income from our endowed professorships to pay salary supplements to faculty members and, in the process, advance a merit-oriented culture. We do not use the income from professorships merely to pay the expenses of faculty or to defray institutional costs. We appoint a faculty member to a professorship for a five-year term only, with renewal explicitly contingent on continued scholarly (or other) productivity. Our donors are delighted by this approach, which requires a faculty member to continue to earn a salary supplement. Our donors do not want the professorships they endow to be used to appoint faculty members to sinecures or to absorb law school operating costs. The contract appointing a faculty member requires the faculty member to use the donor’s name in connection with all publications, presentations, and awards, and to assist the school in other donor recognition efforts.

Remember the wonderfully conspiratorial nature of major gift fundraising. It is fun to listen to the donors and use what they say to craft a gift that is meaningful to the donors and to the school. It is important to listen to the donors rather than drive too hard with your own notion of an end result. We have some gifts that are great for the school that we otherwise would not have received if we

had pushed hard for gifts that were of less interest to the donors. For example, we have one endowment for scholarships for students who are raising families while they are in law school. The donor, Larry Kellogg, said that he and his wife spent three years in law school eating peanut butter sandwiches, and he wanted to help young families facing the problems that they faced. For another example, we were given scholarships for students who are direct descendents of survivors of the Holocaust. The donor, Phil Blank, wanted to honor his wife Rita's parents, who were Holocaust survivors. It is such an honor to be a part of gifts like these!

Good luck with this important work, and have some fun in the process!