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Bob's Latest Annual Giving Departures

February 2004

It was a busy month of "face time," with conference presentations at the CASE 2 District Conference in Philadelphia and the Independent College Advancement Association at the beautiful Cherry Valley Lodge in Ohio.

It was also a month for new clients, including Creighton University, the University of Memphis and Buena Vista University. See you on the road - here's the latest from my briefcase...

Will St. Joe's Basketball Success Lead to Annual Giving Glory?



As I write this, little St. Joseph's University in Philadelphia is one of only two undefeated division 1 basketball teams. (Stanford is the other.) The 22-0 record has generated a lot of excitement on campus, and curiosity about whether the university can convert athletic success into alumni giving support.

Early last month, after the Hawks got to 12-0, the Rev. Timothy R. Lannon, the university president, gathered his top people in athletics, communications, development and admissions to make sure they were suitably focused. "The burden is on us," Lannon said in an interview last week. "We can't just sit back and relish what's happening."

The school, which has 3,850 undergraduates and 7,000 students in all, has a modest endowment of \$80 million. And while the alumni are famously loyal, only 18 percent of them express their loyalty through their checkbooks. Lannon would like to see that number rise to 22 percent, even if the gifts are small. A pitch letter signed by Martelli is in the works.

[Read the full text of this Philadelphia Inquirer article here...](#)

An Eloquent Appeal For Unrestricted Gifts



I encounter many schools that struggle to make an effective case for unrestricted annual gift support. Wesleyan University's "8-point Case For Annual Gift Support" does it with simplicity and eloquence. Too many schools conclude that their prospects "don't accept" their unrestricted case, when a little more creativity might go a long way.

Using phrases like "help us teach students to ask the right questions for the rest of their lives," and "give to a place where giving makes a difference," Wesleyan makes a compelling case without offering a single gift designation option to its prospects.

The Latest Departures:

- **Will St. Joe's Basketball Success Lead to Annual Giving Glory?**
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- **KSU Telefund's "Lord of the Rings" Is Underway**
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If you're frustrated that unrestricted giving isn't more appealing -- make it more appealing!

[Download a copy of Wesleyan's unrestricted appeal here \(pdf format\)... »](#)

KSU Telefund's "Lord of the Rings" Is Underway



It's February in Manhattan, Kansas, which means that excitement is running high with the annual kickoff of the KSU annual giving program's TeleFund campaign.

As featured in the book *Innovations in Annual Giving*, the KSU phonathon utilizes more than 1,600 volunteer students and raises more than \$1 million annually. It's one main reason why Kansas State annually ranks among the highest Big 12 schools in alumni giving participation.

Now, you can see the pageantry of the KSU Telefund program on-line, via a downloadable video used to recruit students for this year's "Lord of the Rings" campaign.

(This 5-minute video is in RealPlayer format, and may require a minute or more to download to your computer.)

[Watch the KSU phonathon video here... »](#)

Matching Gifts Mark Their 50th Anniversary



Matching gifts programs mark their 50th anniversary this year and remain popular vehicles for corporate philanthropy, with some \$1.2 billion in matching gifts donated to charities in 2002 alone. In matching gifts programs, companies match employees' and retirees' gifts to nonprofit organizations. The GE Foundation, the philanthropic organization of the General Electric Company, founded the first matching gifts program in 1954 to encourage GE employees to support the needs and objectives of higher education. Over the years, companies and their foundations -- including the GE Foundation -- have broadened their guidelines to include many other types of community-serving nonprofit organizations, whether art museums or homeless shelters or environmental organizations.

In 2002, matching gifts from corporations represented approximately 10 percent of the \$12.19 billion companies donated to nonprofit organizations, according to Giving USA 2003, the AAFRC Trust for Philanthropy's annual survey. "Matching gifts programs represent a wonderful partnership between individuals, corporate giving programs, and community and education institutions," said Bob Corcoran, GE Foundation president. "They inspire and multiply valuable resources to keep our communities and society strong. We're pleased that so many companies have joined us in creating these programs over the past 50 years."

The history and future of matching gifts programs will be a focus of the Council for Advancement and Support of Education's annual Matching Gifts Symposium, to be held in New Orleans February 4-6, 2004. The symposium will also share best practices, inform participants on tax and regulatory issues, and explore technology trends for nonprofit philanthropy, including methods of cultivating donors online. (For more information on the symposium, [click here.](#)) CASE maintains a database of more

than 7,500 companies that charts the growth of the programs. CASE statistics indicate that the average educational institution receives \$30,000 more in matching gifts today than it did a decade ago. In addition, the average gift that companies match to educational institutions grew to \$885 in 2003, from \$317 in 1993.

[Read the full text of this AScribe article here... »](#)

In UK, Newcastle Experiences First Phonathon Success



Newcastle University raised £250,000 from its graduates, with the aim of using the funds to support less well-off students. This type of alumni fundraising is how many universities in the United States provide grants and bursaries. And it could suggest the direction of other universities, as they set up support systems for higher fees.

Under proposals in the Higher Education Bill narrowly accepted by MPs on Tuesday, from 2006 students will be charged up to £3,000 per year in tuition fees. And in response, a series of universities have announced bursary schemes for less well-off students to offset the higher charges.

Newcastle University's scheme raised money through a "Phonathon", in which current students rang up former students to ask for a contribution to the alumni fund. Much of the fund, raised over eight weeks, will be divided into £2,000 grants which will be given to local youngsters who become students at the university and who need financial support.

"Most of our graduates have successful careers and they are obviously keen to see talented young people enjoy the same opportunities as they have, no matter what their background," said Joanna Stewart of the university's alumni office.

[Read the full text of the BBC article here... »](#)

Intercollegiate Competition Extends To Senior Giving Campaigns



Victory over Indiana University, donating money and increasing the value of the Purdue degree are possibilities for Purdue in the Purdue-IU Senior Face Off.

The second year of the Purdue-IU Senior Face Off starts this March. The Senior Face Off looks for graduating seniors to donate money to contribute to the University.

Associate director of annual giving Kyle Bymaster said the event is a "campaign focused on educating students on giving back to Purdue" and a contest between IU and Purdue to have the most senior participation.

Students graduating in May, August, and December are eligible to give. Donations may start at \$1 but average between \$25 and \$50. Bymaster said last year Purdue seniors raised more money than IU seniors, approximately \$25,000 to \$40,000.

[Read the full text of this Purdue Exponent article here... »](#)

Subscribe To Fundlist And Join The Discussion



FundList has existed for ten years and is the largest email listserv for fundraisers in the world - with more than 2,000 subscribers. It's my third year serving as the moderator of this great annual giving resource. Subscribing is easy, and message postings are completely spam-free!

If you're not familiar with a listserv, subscribers can post questions to the FundList mailbox. Your question gets sent out to FundList's 2,000 subscribers, and you'll receive responses in reply from those who have something to offer. It's a great way

to keep abreast of the latest issues in annual giving, and a great way to keep informed about the best new ideas as well.

FundList subscribers additionally enjoy access to the FundList Briefcase - an on-line repository of direct mail pieces, telemarketing scripts, program plans, and hundreds of other samples shared by dozens of institutions through FundList over the years.

Give it a try - It's all free.

[Learn more about FundList here... »](#)

CASE Webinar Featured Among Bob's Upcoming Presentations



The Bob CASE book, *Innovations in Annual Giving*, will be featured in 2004 as part of the ongoing CASE Online Speaker Series. The first session, scheduled for Wednesday, April 14th, will feature an overview of the book, as well as a special discussion on donor surveys and their use in annual giving.

My special guests for the April 14th session will be Laurent "Lo" DeJanvry of the University of California-Berkeley Cal Fund, and Mari Aylin of St. Olaf College. Both schools have recently conducted alumni giving surveys and Lo and Mari will discuss some of their findings. Other upcoming presentations include:

July 19, 2004 - Sharing the Annual Fund Fundamentals (STAFF) Conference at Union College (Members Only) - Reactivating Lapsed Donors

July 26, 2004 - Ruffalo CODY Users Group Conference Westin Hotel, Downtown Chicago, Illinois Topic To Be Announced

[Get more info about the CASE Webinar here... »](#)

"Innovations In Annual Giving" Available At the Case Web Site



CASE happily reports that 78 copies of *Innovations in Annual Giving* were sold at the recent CASE/NAIS independent schools conference in Washington, D.C. Here are some recently-received testimonials for Bob's book:

"*Innovations in Annual Giving* will provide those managing mature annual funds in the UK with a host of ideas and a broad focus to

consider how they may wish to take their programmes forward." --
Hamish Stewart, Head of the UCL Annual Fund, University College London

"Besides the furor of new ideas it has generated, the book itself has become
invaluable when approaching the many different academic units that we support and
offering alternative options to the standard approaches." -- Laura Lucas and Tim
McLaughlin, Mizzou Annual Fund, University of Missouri

"More Innovations in Annual Giving," featuring ten international "departures," will be
available in December, 2004.

[Order "Innovations in Annual Giving: Ten Departures That Worked" here... »](#)

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