

GG+A Quarterly Review

Spring 2011

GG+A
Grenzebach
Glier and
Associates

Philanthropic News & Analysis

CELEBRATING 50 YEARS
50
Sustainable Philanthropy

The Resiliency of the Comprehensive Campaign *Standard Model Adapts to New Economy*

As the decade drew to a close and nonprofit institutions strove to meet the challenges of a difficult philanthropic environment, many continued to rely on the tried-and-true fundraising model – the comprehensive campaign. In the final months of 2010, higher education institutions such as **Rutgers**, **Texas Tech**, and the **University of California, Davis** announced billion-dollar campaigns. In early December, **Columbia University** added two years to its campaign timeline and raised its campaign goal, announced in the fall of 2006, to \$5 billion, making it the largest fundraising effort in American higher education.

While the number of major campaigns continues to grow, this is not the time for business as usual. Some institutions are adjusting the schedule and tactics of their campaigns to deal with the new economy by choosing, for example, to extend campaign counting periods or to deploy more staff to planned giving programs (“With Megagifts Hard to Get, Colleges Chase More

Donors,” *The Chronicle of Higher Education*, November 21, 2010).

In this issue of the *Grenzebach Glier Quarterly Review*, chief development officers and senior administrators from educational and cultural institutions share examples of the growing alignment of campaigns and strategic plans, new strategies to meet donor and institutional

continued on page 2

Campaigns Weather Leadership Transitions

A presidential transition during a comprehensive campaign brings its own set of challenges. Chief development officers must quickly rally prospects and donors and maintain their confidence in the campaign, while a new president faces an accelerated learning curve and immediate immersion in the development activities of the institution.

When **Amherst College** President Anthony Marx announced in late 2010 his decision to assume the presidency of the **New York Public Library** later this year, leadership of the \$425 million *Lives of Consequence Campaign* sprang into action. “We met immediately to discuss the future of the campaign, recognizing that by the time the president leaves at the end of this academic year, there is a strong chance our campaign goal will be met,” says Megan Morey, Amherst’s chief advancement officer. Still, board members chose to stick with the campaign’s 2013 closing date. “The board agreed we are just hitting our stride, and we want to

continued on page 11

In this Issue

Philanthropy
Average Giving By Wealthy Individuals
Fell in 2009...15

Nota Bene
Cambridge, Oxford Campaigns
Top £1 Billion...12

The Resiliency of the Comprehensive Campaign

continued from page 1

needs, and expanding roles for volunteer leadership.

Campus Planning Efforts Dovetail

In a fundraising environment that has left donors calling for greater accountability and institutions reeling from the impact of the economic downturn, many nonprofits are turning to a “best practice” of long duration with a

deliberate, carefully articulated link between campaign objectives and institutional strategic plans.

Bruce Loessin, senior vice president for university relations and development at **Case Western Reserve University**, notes greater involvement at all levels of the university in campaign planning. “Department chairs and deans have appeared in front of volunteer leadership more often to present background information, statistics, and outcomes. As a result, we sharpened our academic priorities and produced a cost-efficient, outcome-oriented plan that capitalizes on the collective values of the institution.”

Throughout the recession, Case Western maintained its original campaign planning strategy, “high on academic substance and low on hype,” says Loessin. “We have a very metrics-driven institutional development program, and the economy actually strengthened our planning process. The economic downfall may have changed our trajectory, but not the overall campaign.”

The University of Vermont is riding the coattails of its second best fundraising year ever, 2010, as it moves into the planning stages of its next campaign. “Major campaign priorities hit real pressure points in

the university’s business plan,” says President Daniel Mark Fogel, citing the growing need for financial aid as the university’s greatest area of vulnerability. In an attempt to match additional gaps identified in the business plan, “We’ve outlined a very ambitious stretch goal for bricks and mortar projects. We’ve been modeling 20 percent of the \$500 million goal we’ve been testing for capital projects.”

Bucknell University President John Bravman, who joined the university in July 2010, is taking another look at the six-year-old strategic plan that gave rise to *Fulfilling the Promise*, a \$400 million initiative already underway. “The high-level priorities are not changing, but some of the details are,” he notes. The university is close to raising half of its goal, the largest in the school’s history, but the economy and change of leadership have kept the campaign in what Bravman calls “a nascent stage. My meetings with large and small groups in the months to come will inform my analysis of how the campaign should evolve.”

President Lex McMillan notes that **Albright College** recently completed its campus master plan. “We want key donors to have a voice in refining and addressing priorities as we begin planning for our next campaign,” says McMillan. “We

GG+A Quarterly Review Philanthropic News and Analysis Spring 2011, Vol. 7, No. 2

Donna L. Wiley | Executive Editor
Carol Morken | Managing Editor
Nancy Grund | Editor
Paul Mateo | Editorial Associate
Kristin Lewis | Editorial Associate
Simple Studio | Graphic Designer

Editorial Board

John J. Glier, Chair
G. Robert Alsobrook
Martin Grenzebach
Kathleen A. Kavanagh
D. Lance King

An international leader in philanthropic management consulting, Grenzebach Glier and Associates (GG+A) has 50 years of experience with educational, cultural, medical, and other nonprofit institutions. The goal of the *Review* is to provide timely information about issues and events that are relevant to philanthropy.

The *Review* is available for download at www.grenzebachglier.com and via e-mail upon request. Comments, questions, suggestions, and topics of interest are welcome. E-mail us at contactus@grenzglier.com.

©2011 by Grenzebach Glier and Associates. All rights reserved. Re-publication must include accurate attribution with copy provided to GG+A.

Global headquarters

401 North Michigan Avenue
Suite 2800
Chicago IL 60611
P 312.372.4040
F 312.589.6358

believe donors will agree that our most compelling case is a student-focused campaign that highlights the transformational educational experience at Albright.”

Herman Saatkamp, Jr., president of **The Richard Stockton College of New Jersey**, believes the time has never been better to launch a campaign “with the growth of the college and with community engagement at its highest point.” He admits, “The downturn forced us to think more seriously about our focal point and align fundraising with college goals. We knew student support was important, but it will be a more central component of our campaign than we expected.” He

anticipates publicly announcing the college’s first campaign later this year, which will mark Stockton’s 40th anniversary of teaching.

Strategies for the New Economy

For those institutions in the midst of comprehensive campaigns, the road to reaching campaign goals has taken new twists and turns, including revitalized efforts to engage constituents at all levels who have the capacity to shape the future of institutions.

Cornell University announced its \$4 billion *Far Above...The Campaign for Cornell* in 2006 and, by fall 2008, the university had imposed

budget cuts across the institution. In response, Charlie Phlegar, vice president for advancement, agreed to eliminate a number of positions in development and alumni relations, and the campaign made several mid-course adjustments. “We decided to back off building projects and focus more on student financial aid support,” explains Phlegar, who says the repositioning was motivated by new presidential and provostial leadership, coupled with economic issues that forced Cornell to engage in a thorough strategic planning process.

In the last 12 months, Cornell has turned its attention to faculty renewal and the support of

continued on page 4

Top 10 Current Comprehensive Campaigns: Higher Education

| Institution | Current Goal | Announce Date | Scheduled Completion |
|------------------------------------|-----------------|---------------|----------------------|
| Columbia University | \$5,000,000,000 | 2006 | 2013 |
| Stanford University | \$4,300,000,000 | 2006 | 2011 |
| Cornell University | \$4,000,000,000 | 2006 | 2011 |
| Yale University | \$3,500,000,000 | 2006 | 2011 |
| University of Pennsylvania | \$3,500,000,000 | 2007 | 2012 |
| University of Virginia | \$3,000,000,000 | 2006 | 2011 |
| University of Texas, Austin | \$3,000,000,000 | 2008 | 2014 |
| City University of New York | \$3,000,000,000 | 2007 | 2015 |
| University of California, Berkeley | \$3,000,000,000 | 2008 | 2013 |
| University of Illinois (system) | \$2,250,000,000 | 2007 | 2011 |

Note: This represents the publicly reported data available at the time of publication.

The Resiliency of the Comprehensive Campaign

continued from page 3

professorships. “One strategy links expendable support with endowments that can help us bridge the short-term gap created by pending retirements. We can fund young faculty on soft current-use money,” notes Phlegar. “By the time retirements begin, endowments should be recovering.”

Just as **Phillips Academy** was launching the public phase of its \$300 million *Campaign for Andover: Building on the Surest Foundation*, the institution took

we’ve raised \$25 million in cash each year with only \$3 million in gifts of appreciated securities during that period. That gives you an indication of the shift among major donors.” Having surpassed \$220 million in gifts and pledges, the Academy may have to extend its campaign into fiscal 2013.

Martin Shell, vice president for development at **Stanford University**, admits that a slow-down in major and principal gifts in 2009 made it the most challenging

“a number of donors made expendable gifts to ensure that the philanthropic intent of their original endowment was maintained during the downturn.” He adds that, before 2008, “we had a remarkable record of pledges paid well before their due dates. Many pledges were retired in about three years. Now a greater number of donors are using the more traditional five-year payment schedule. It is not a significant elongation, and we believe most will be paid in the traditional time frame, but it is a change since the onset of the recession.”

“The downturn forced us to think more seriously about our focal point and align fundraising with college goals.”

Herman Saatkamp, Jr., The Richard Stockton College of New Jersey

steps to solidify that foundation with a \$6 million budget reduction. “In 2009, the development and alumni relations operation reduced staff and operating expenses,” says Peter Ramsey, secretary of the Academy. “Both communications and alumni relations needed to continue engagement efforts, so we sacrificed, at least in the short run, on the development side.”

Ramsey notes, “We normally average nearly \$30 million in cash gifts each year. For fiscal 2009 and fiscal 2010,

year for *The Stanford Challenge*, a \$4.3 billion initiative set to end in late 2011. “In previous capital campaign efforts, we would sit across the table from a donor and ask for his or her support for the ‘campaign.’ The focus often was more about supporting the campaign and less about the purpose of the gift. This campaign is much more about conveying the ideas and initiatives that cross programs and disciplines.”

Shell notes that at a time when many endowments were underwater,

The University of Nebraska Foundation went public with its *Campaign for Nebraska: Unlimited Possibilities* in late 2009 with a goal of \$1.2 billion over nine years. This target was up from the campaign’s goal of \$1 billion over seven years in the quiet phase, according to Clarence Castner, foundation president and chief executive officer. Castner cited other campaign adjustments: “We are holding the fundraising budget flat, and funds raised for capital projects are now a greater percentage of the overall goal.”

Re-engaging Donors

Although the economy created some hesitancy to launch Amherst College’s campaign in 2008, within the year two large anonymous gifts totaling

continued on page 6

Average Giving by Wealthy Individuals Fell in 2009 Commitment to Giving Remained Strong

Wealthy individuals continue to support philanthropy, with some 98 percent of high net worth households making charitable donations in 2009, according to *The 2010 Study of High Net Worth Philanthropy* sponsored by Bank of America Merrill Lynch and conducted by the Center on Philanthropy at Indiana University. Despite their strong commitment to philanthropy, average charitable giving by high net worth households dropped 34.9 percent from \$83,034 in 2007 to \$54,016 in 2009. Other study highlights:

- Nearly three-fourths of donors (72.4 percent) report that they give when they believe their gifts will make a difference. In 2007, the majority of donors (81.2 percent) cited wanting to give back to the community as their primary motivation for giving.

- The top three reasons why donors stopped giving to a particular charity: too frequently solicited or asked for an inappropriate amount (58.9 percent); decided to support other causes (34.2 percent); and household circumstances changed (29.4 percent).

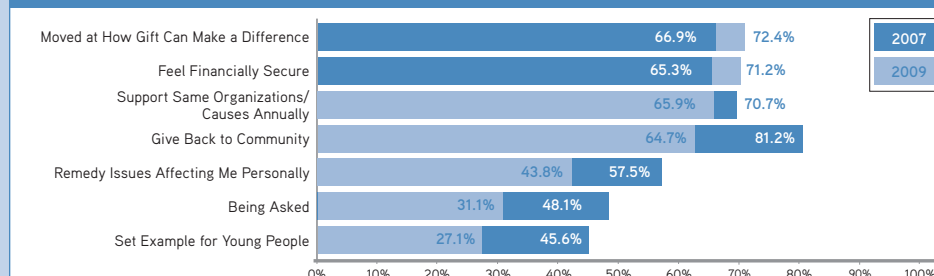
- More than 78 percent of high net worth individuals volunteered in 2009, representing an increase of 3.8 percent from 2007.

Average Amount Given by High Net Worth Donor Households, 2007 and 2009

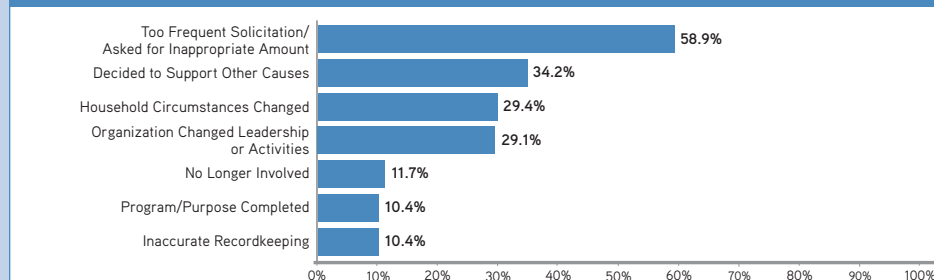
| | 2007* Average Giving | 2009 Average Giving |
|--|-------------------------|------------------------|
| TOTAL | \$83,034 | \$54,016 |
| Religious | \$17,635 | \$9,985 |
| Secular | \$71,200 | \$46,852 |
| Gifts to Foundations and Donor-Advised Funds | \$62,680 | \$75,867 |
| Umbrella Organizations (United Way and others) | \$9,352 | \$5,240 |
| Basic Needs | \$3,702 | \$2,959 |
| Youth/Family Services | \$9,103 | \$7,641 |
| Health | \$12,430 | \$4,511 |
| Education | \$28,329 | \$12,759 |
| Arts | \$4,958 | \$5,531 |
| Environment/Animal Care | \$3,281 | \$3,410 |
| International | \$4,203 | \$4,587 |

*Charitable giving for 2007 was adjusted for inflation to 2009 dollars.

Motivations for Giving to Charity, 2007 and 2009



Reason(s) for Stopping Support of a Previously Supported Organization



Source: *The 2010 Study of High Net Worth Philanthropy* sponsored by Bank of America Merrill Lynch

The Resiliency of the Comprehensive Campaign

continued from page 4

\$125 million broadened the college's ability to reach prospects and re-engage with alumni across the giving pyramid. "From the onset, the president made it clear this campaign is as much about re-engagement as it is about raising money," says Morey,

At Phillips Academy, Ramsey cites a broader use of advisory committees and a stronger online presence in its campaign engagement efforts. "We now have nine advisory committees, both programmatic and development-oriented, chaired by volunteers. These 180 to 200 committee members have helped us develop an extended volunteer network and reach a broader population," says Ramsey.

Exploring Technology Tactics

Cornell has turned to technology to improve campaign communications, using social media to engage constituents, including weekly webinars to highlight faculty. "We need to think about how donors want to hear from us instead of how we want to communicate with them. That will require multiple channels," Phlegar notes, citing how Cornell's development operation now provides electronic receipts for all gifts, with links from the receipts directly to web pages associated with donors' interests.



Phillips Academy has become more adept at communicating digitally in this campaign, according to Ramsey, who cites an online giving guide that targets current-use gifts in support of some 15 different programs and allows donors to click through brief descriptions of giving options and make their commitments. "In the last three years, we have more than quadrupled both the number of donors and dollars through online giving. In fiscal 2010, the Academy received more than 3,000 online gifts totaling nearly \$2 million."

Broadening the Base

A critical part of every campaign is increasing the donor base from entry-level to major gifts. Identifying new donors who can help broaden the gift pyramid continues to be a significant component of fundraising efforts.

Pat Jacoby, who recently retired from her position as deputy director of the **Museum of Fine Arts, Boston**, worked to construct more intricate challenges and engage all levels of donors to meet the \$504 million goal of the *Building the New MFA* campaign because "challenges do make people sit up and take notice." She describes how a challenge made public in November 2009 included a gift of \$35 million if the museum could raise another \$35 million from 10 additional donors in just six weeks. In addition, from January 1 to June 1, 2010, the initial donor offered to match another \$70 million from all museum constituents. Jacoby reports the museum successfully met both challenges.

Cornell has undertaken a focused approach to work with donors 65 and older. "We have a massive group

of baby boomers moving into the time of their lives when the most significant philanthropy happens,” says Phlegar. “We started a more robust *Cornell on the Road* campaign that we took to various locations around the country to engage donors.”

Within the last year, Cornell’s development operation has added staff members on the West Coast and opened an office in New York City to cover the Northeast corridor, where half of its donor base is located. There are also plans to open an office in Hong Kong “to get more feet on the ground closer to our alumni bases.” Phlegar describes, “We are

beginning to see multi-million dollar gifts from international alumni. Our international donor base provides huge opportunities.”

Stanford also has invested more time, energy, and resources in international outreach. “Historically, a significant portion of our international gifts came from expatriates living overseas. In the past several years we have seen very strong growth of philanthropic support from alumni from Hong Kong, People’s Republic of China, Taiwan, Singapore, and India,” says Shell, who notes Stanford continues to have consistent support from alumni in Mexico and Latin America.

With a thriving admissions program in Asia for more than four decades, Phillips Academy has translated that success into a full-scale partnership, which includes fundraising. “Gifts from Asia are at \$7 million in this campaign, and we hope to double that by the end of the campaign,” offers Ramsey. The Academy recently launched an Asia Council with 30 members from various countries in Asia who are willing to assist in admissions, alumni and parent relations, support for faculty and student off-campus experiences, and fundraising.

While other institutions targeted their efforts, Case Western

continued on page 8

Top 10 Current Comprehensive Campaigns: Independent Medical Centers

| Institution | Current Goal | Announce Date | Scheduled Completion |
|--|-----------------|---------------|----------------------|
| Memorial Sloan-Kettering Cancer Center | \$2,000,000,000 | 2003 | 2011 |
| Massachusetts General Hospital | \$1,500,000,000 | 2010 | 2013 |
| Cleveland Clinic | \$1,250,000,000 | 2006 | 2010 |
| MD Anderson Cancer Center, The University of Texas | \$1,200,000,000 | 2010 | 2011 |
| City of Hope | \$1,000,000,000 | 2010 | 2013 |
| Mount Sinai Medical Center | \$1,000,000,000 | 2008 | 2013 |
| University Hospitals (Cleveland) | \$1,000,000,000 | 2010 | — |
| Children’s Memorial Foundation (Chicago) | \$600,000,000 | 2008 | 2012 |
| Florida Hospital | \$600,000,000 | 2006 | 2012 |
| Brigham and Women’s Hospital | \$500,000,000 | 2008 | 2012 |

Note: This represents the publicly reported data available at the time of publication. No campaigns for academic medical centers that are part of a university-wide initiative are included in this chart.

The Resiliency of the Comprehensive Campaign

continued from page 7

Reserve University became more comprehensive, in order to “get funds flowing from every nook and cranny,” says Loessin. “We paid attention to stars in less popular specializations and found that a greater degree of comprehensiveness and heightened interest from smaller donor communities worked for us.”

Volunteer Leadership More Important Than Ever

The success of any campaign is directly linked to trustee and university leadership. While a more concentrated engagement of board members throughout a campaign may take a great deal of time and energy, the result can go far in attaining campaign goals.

“My greatest contribution to the museum campaign was my work with trustees,” says Jacoby. “They wanted to build a new wing, and they wanted to support the vision of museum leadership.” The majority of the museum’s trustees are based in Boston and met monthly throughout the campaign, which Jacoby says helped to solidify the group. “Our trustees socialize together, and they do business together, which lends itself to a strong group philanthropic effort.”

Arcadia University’s \$23.5 million *At Home & In the World* campaign was launched in 2007, spurred by the confidence of a single trustee who provided a \$5 million lead

commitment consisting of a multi-year outright gift and an estate gift, explains Nick Costa, vice president for university advancement. “That trustee also made a \$2 million challenge to the board, which raised \$2.8 million. The challenge inspired another trustee, who previously committed \$1 million to the university, to add \$250,000 to her gift. In total, trustees have contributed 40 percent of funds raised for the campaign.”

In the last seven years, Stockton College doubled the size of its foundation board from 20 to 40 members, many of whom have been very active hosting dinners and events to generate support for the

Top 10 Current Campaigns: Cultural Institutions

| Institution | Current Goal | Announce Date | Scheduled Completion |
|--|---------------|---------------|----------------------|
| Metropolitan Museum of Art | \$900,000,000 | 2000 | — |
| Lincoln Center for the Performing Arts | \$702,000,000 | 2006 | 2012 |
| Whitney Museum of American Art | \$590,000,000 | 2008 | — |
| New York Public Library | \$500,000,000 | 2008 | 2013 |
| San Francisco Museum of Modern Art | \$480,000,000 | 2010 | 2016 |
| Los Angeles County Museum of Art | \$450,000,000 | 2005 | — |
| George W. Bush Library and Museum | \$400,000,000 | — | 2011 |
| Cleveland Museum of Art | \$350,000,000 | 2002 | 2013 |
| National World War II Museum | \$300,000,000 | 2004 | 2012 |
| Brooklyn Academy of Music | \$300,000,000 | 2009 | 2014 |
| San Francisco Exploratorium | \$300,000,000 | 2010 | — |

Note: This represents the publicly reported data available at the time of publication.

upcoming campaign. “We are looking to increase the state-appointed board of trustees to include 15 members to better address our campaign needs,” says Saatkamp.

The University of Nebraska has rallied volunteer leadership at all five of its campuses in an attempt to boost campaign results. For the first time, all campuses joined forces under the leadership of one executive campaign committee, according to Castner.

The University of Vermont is among a minority of public universities without a foundation. “We are planning to incorporate a foundation next year to create a cadre of volunteers with a degree of engagement in philanthropic support of the institution that our current governance structure does not allow,” says Fogel.

Anticipating considerable turnover in the Bucknell University board over the next five years, Bravman

says that, for the first time, there will be an explicit expectation that new board members make a significant philanthropic commitment to the university.

“Many of our board members have been extremely generous, but the way Bucknell is positioning itself, the board must be heavily involved in giving. We must leverage board gifts in soliciting broader support from those outside the board who have the capacity,” says Bravman.

continued on page 10

Best Practices in Campaign Planning and Implementation

Post-Recession Strategy for Institutions Large and Small

A well-executed campaign provides the platform for ambitious fundraising. It adds momentum, urgency, and a heightened level of awareness that certain strategic and operational goals can be met only through private philanthropy. GG+A suggests the following “best practices” in campaign fundraising:

- Translate the institution’s strategic objectives into a finite set of tangible, quantifiable needs.
- Ensure that your principal prospects are genuinely engaged at every stage of institutional planning. More than 95 percent of campaign receipts will come from fewer than 5 percent of your donors.
- Build a network of campaign volunteer leaders – knowledgeable advocates who will help identify and cultivate potential donors while serving as important exemplars of extraordinary philanthropy. Potential donors will be keenly interested in the aggregate campaign support from the board.
- Understand that the chief executive will always be central to campaign fundraising. Review administrative support structures to ensure enough time and flexibility for him/her to engage leadership donors effectively.
- Recruit a cadre of campaign insiders – deans, faculty members, physicians, curators, program directors – who can present the big picture as well as make the case for a particular program.
- Recognize that donors today are likely to exercise a level of due diligence that requires transparency in institutional and program planning and finances.
- Communicate philanthropic needs consistently beyond development publications, utilizing digital and print media, press releases, and remarks by leadership.
- Measure and report progress against interim and overall goals throughout the campaign.
- Plan announcements of major gifts carefully to communicate and celebrate success at key intervals.
- Do not neglect your leadership donors as the campaign progresses. Organize a stewardship effort that considers each principal donor’s timing and the potential for additional support during the campaign and beyond. Institutional needs will not cease at the successful conclusion of your campaign.

The Resiliency of the Comprehensive Campaign

continued from page 9

Preparing for the Future

Interviewees agree that the comprehensive campaign remains the most efficient model for institutional fundraising, citing its ability to engage all stakeholders across an institution and to align closely with strategic plans.

“The comprehensive campaign remains the pre-eminent tool for corraling and securing the impulse to give,” affirms McMillan.

Still, greater planning and analysis may be required along with staffing

older and more experienced group of development professionals flowing back into the marketplace. “Instead of retiring at 62 or 65, people may work for another five to ten years or move from development management positions back into the field, which would be good for the profession and helpful in reaching baby boomer donors.”

Jacoby notes a greater need for planned giving officers who can deal with high-level gifts in future campaigns. “We must hire development officers and planned

institutions continue to conduct campaigns with the highest level of financial integrity.

“During a campaign, our job is to secure resources for the academy, to ensure the highest level of performance from its development operations, and to have an immediate as well as long-term positive effect on the institution,” says Shell. “When campaign dollars are raised, we have a responsibility to the board, to senior leadership, and to the faculty that those gifts are secured within a given period of time for the most compelling needs of the institution. We also have a fiduciary responsibility to our donors to ensure that those gift dollars are applied to the purposes and needs for which they were given.”

Ramsey concurs. “Our donors are not interested in the institutional arms race and who has the largest campaign goal. They want to know that they are supporting the mission of the Academy and that we are carrying out their intentions and reporting realistic numbers,” says Ramsey. “In counting planned gifts, we use present value calculations. Our trustees are proud of and committed to our counting method even if it means some contributions may not count toward the campaign.” ❖

“We must leverage board gifts in soliciting broader support from those outside the board who have the capacity.”

John Bravman, Bucknell University

adjustments to reflect the increasing sophistication of donors.

“For years we’ve had an automatic optimism thinking that every campaign would have a good outcome,” says Loessin. “More than ever, we need to look at the big picture, to analyze national data and goals. Campaigns will increasingly require more planning and more metrics.”

Phlegar foresees that future campaigns may benefit from an

giving officers who are sophisticated and conversant enough to deal comfortably with super, mega-wealthy donors,” she notes.

Maintaining Integrity

At a time when some institutions are counting in-kind gifts and revocable donations that may not come to an institution until long after the campaign ends (“With Megagifts Hard to Get, Colleges Chase More Donors,” *The Chronicle of Higher Education*, November 21, 2010), it is critically important that

Campaigns Weather Leadership Transitions

continued from page 1

keep our momentum going.” Morey notes that other institutional leaders will help fill any fundraising void following the president’s departure.

With less than one year remaining in Arcadia University’s campaign, the president announced his retirement. “We quickly made phone calls and sent e-mails and personal notes to be sure we communicated with all donors and that they remained confident in the campaign’s direction during the transition,” says Nick Costa, vice president for university advancement. “Through construction photos in our campaign materials and ongoing communications, we are conveying our steadfast commitment

to building a new student center and continuing to strengthen donor relationships with the institution.”

The expectations for presidential involvement in campaigns continue to grow, according to Albright College President Lex McMillan. “People want to see and talk to the president; they measure the character of an institution and the stability and validity of a campaign through their interactions with the president,” he explains.

Bucknell University President John Bravman tackled a large learning curve last summer when he joined the university, which was

then in the quiet phase of its current campaign. “You have to learn quickly to tell stories of the institution with passion and conviction that resonate with alumni. It takes knowledge of the culture, history, and feel of the institution.”

Bravman has relied on “those three, five, and ten-minute chats with people that allow you to build a stable of facts and figures that are so compelling in development efforts.” Moving into his second semester at Bucknell, Bravman says, “Campaign planning is at the top of my list, getting to know the development staff better and getting on the road.” ❖

Examples of Current Independent School Campaigns

| Institution | Current Goal | Announce Date | Scheduled Completion |
|------------------------------|---------------|---------------|----------------------|
| Phillips Academy (Andover) | \$300,000,000 | 2009 | 2012 |
| Choate Rosemary Hall | \$200,000,000 | 2006 | 2011 |
| St. Mark’s School of Texas | \$110,000,000 | 2009 | 2013 |
| Woodberry Forest School | \$100,000,000 | 2008 | — |
| Polytechnic School | \$93,000,000 | 2008 | 2012 |
| McDonogh School | \$75,000,000 | 2010 | 2015 |
| Haverford School | \$60,000,000 | 2008 | — |
| Greenwich Country Day School | \$50,000,000 | 2008 | 2011 |
| Dalton School | \$50,000,000 | 2010 | 2012 |

Note: This represents the publicly reported data available at the time of publication.

Cambridge, Oxford Campaigns Top £1 Billion

Higher education institutions received more million-pound gifts than any other fundraising sector in the UK in fiscal 2008-2009, for the first time surpassing charitable trusts, according to the *2010 Coutts Million Pound Donors Report* released last fall (Coutts & Co. and University of Kent Centre for Philanthropy, Humanitarianism and Social Justice). The report attributes

of Oxford differ immensely around the globe, we need to communicate effectively about the immense breadth of activity — our world-class, 21st-century, cutting-edge research; the international nature of our students; and the importance of our research and collections. By so doing, we convey to alumni and friends that excellence is still at the forefront.”

upward trend for the first three years of the public phase, but inevitably our numbers were down for 2008-2009,” says Peter Agar, director of development and alumni relations, who used Cambridge’s 800th anniversary as a reminder to donors of the longevity and transformational impact of their investments. “However, there was some recovery in 2009-2010, and that uplift is continuing.”

“The innovative part of this campaign has not been our techniques, but our ability to persuade the collegiate university that an institution-wide campaign involving everyone would be a good thing for Cambridge.”

Peter Agar, University of Cambridge

One of Agar’s biggest challenges has been harnessing the energy and independence of the university and its 31 colleges, focusing simultaneously on internal and external constituencies to strengthen fundraising effectiveness. “Campaigns do not work unless they are aligned with the culture of the institution,” says Agar. “The innovative part of this campaign has not been our techniques, but our ability to persuade the collegiate university that an institution-wide campaign involving everyone would be a good thing for Cambridge.”

the increase to a greater understanding of the roles higher education plays in society as well as the success of special UK government incentives to encourage giving to colleges and universities. The **University of Cambridge** and **University of Oxford** benefited from continued generosity in the UK and abroad in 2010, when each announced hitting the one billion pound mark in their respective campaigns.

A key element of the £1.25 billion *Oxford Thinking* campaign has been a commitment to building relationships, particularly among its 170,000 alumni in 140 countries. With faculty members and programs based around the world, “our international connectivity and relevancy continues to grow,” says Sue Cunningham, Oxford’s director of development. “Because perceptions

Volunteers have helped in forging key relationships for the University of Oxford. “The connections that volunteers have helped us make in the UK and overseas have been critical to our success,” says Cunningham. “Campaigns build energy and momentum, and this campaign has given us a greater sense of confidence,” notes Cunningham. “We are committed, across the university and colleges, to creating a sustained fundraising effort for Oxford’s core academic priorities in teaching and research for the long-term future.”

Cambridge’s *800th Anniversary Campaign: Transforming Tomorrow*, launched publicly in 2005 with a £1 billion goal, surpassed that mark two years ahead of schedule and is due to continue through 2012. We saw an

Under the banner of the campaign, Agar boosted the budget for the university’s central development and alumni relations office and strengthened relationships with the development staff working in Cambridge’s colleges and the institution’s U.S. arm, Cambridge in America (CAM). “We also formed an international campaign board with 16 members, making it clear that board members are expected to make very significant gifts.” All have made gifts or firm pledges of £1 million or more, Agar reports. ♦