

## Chapter 40

# Effective Approaches in Higher Education Development: A Survey in Fundraising Best Practices

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### **ABSTRACT**

*Effective approaches in higher education development will look at a variety of topics ranging from corporate and foundation relations, to alumni participation, the importance of online giving, campaigns, top advancement trends in higher education, and the ever-critical cultivation of major and mega gifts. The education of a constituency about the importance of private gifts to both public and private institutions cannot be overstated as well given that tuition costs soar yet prospective students, parents, and boards continue to fight for the value proposition. After reading, reviewing, and studying this chapter, faculty, students, and professionals alike will have surveyed knowledge of effective approach in higher education development and will have a greater appreciation for the work that development staff encounter every day. The objective of this book “to explore contemporary and future philanthropy approaches and development theory in international higher education,” will certainly be enhanced exponentially by the thorough and useful information presented.*

Every year new advancement strategies and tactics are presented in books, papers, online, and at conferences around the world. Fundraise this way, engage alumni that way, marketing your mission with this twist. The reality? Advancement, and more specifically, development/fundraising at its core has not changed in hundreds of years.

This chapter will look at a variety of topics ranging from corporate and foundation relations, to alumni participation, the importance of online giving, campaigns, top advancement trends in higher education, and the ever-critical cultivation of major and mega gifts. The education of a constituency about the importance of private gifts to both public and private institutions cannot be overstated given that tuition costs soar yet prospective students, parents, and boards continue to fight for the value proposition. After

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reviewing, faculty, students, and professionals alike will have surveyed knowledge of effective approaches in higher education development and will have a greater appreciation for the work that development staff encounter every day.

## **CAPITAL VS. COMPREHENSIVE CAMPAIGNS IN MODERN FUNDRAISING**

“Capital Campaign” vs. “Comprehensive Campaign”. In the early days of fundraising campaigns, during the middle of the 20th century, most campaigns just focused on capital needs specific to facilities. Of course, other campaigns focused on endowment needs, scholarship, programs, or other special priorities. During the past 15 to 20 years, the approach to campaigning has expanded, and now most campaigns are comprehensive campaigns that include facilities, endowment, scholarship (in the case of higher education), programmatic, and operating support. Mega-campaigns in health care and higher education are frequently setting goals of a billion dollars or more. These mega-campaigns are almost always comprehensive campaigns that include all gifts to all areas of the organization given during the campaign period.

Comprehensive campaigns frequently raise question about how to “count” gifts but the reality is that comprehensive campaign production and results include any and every dollar raised in the organization. This can include but is not limited to cash, securities, gifts-in-kind, and estate gifts (planned giving). Major gifts, annual gifts, monthly gifts, lifetime gifts; regardless of the frequency, duration, or size of a gift it is a common misconception that one “counts” more in a comprehensive campaign than another.

The Council for the Advancement and Support of Education (CASE) publishes counting standards and below are their recommendations. These should always be referenced through CASE prior to and during any campaign as they do change periodically (‘Preliminary Report of the Campaign Standards Working Group’, n.d.).

### **CASE Recommendations**

The working group makes the following recommendations specific to campaign counting and reporting (see attachment for proposed language recommendations and a comparison with current language in the third edition of the CASE Management and Reporting Standards):

- Revocable gifts may be included in campaign totals at face value if they are pledged during the campaign, documented, and as long as they are reported separately from outright gifts and irrevocable deferred gifts.
- Irrevocable deferred gifts may be included in campaign totals at face value, but both face and discounted present values should be reported.
- Conditional pledges may be included in campaign totals if there is a reasonable expectation that the conditions under which the pledge is made will be met during the campaign period and if there is appropriate documentation.
- Campaigns should be tied to the strategic goals of the institution, and for this reason the length of a campaign may vary. However, in order to maximize the commitment of volunteers, donors, staff and others, CASE recommends that a comprehensive campaign period generally not exceed eight years.

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