



**MONTANA**  
**STATE UNIVERSITY**  

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**ALUMNI FOUNDATION**

MSU Department Head Retreat

# Fundraising & Working with the MSU Alumni Foundation

June 7, 2018

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Chris Murray, MSUAF President/CEO  
Mary Jane McGarity, MSUAF Vice President for Development



# Agenda



MSU Alumni Foundation overview



The philanthropic landscape



Raising new funds: development and fundraising at MSU



Q & A

# Mission

We cultivate lifelong relationships and secure private support to advance Montana State University.



# Vision

We are a trusted and integral partner, advancing Montana State University's land grant mission of learning, discovery and engagement through relationships and resources.



# 125 years in the making ...

**1893**

Montana State  
College founded

**1903**

Alumni  
Association  
founded

**1946**

Research  
foundation  
started

**1965**

MSC  
becomes  
MSU

**2010**

*What It Takes*  
campaign  
begins silent  
phase

**2012**

Alumni association  
and foundation  
merge to become  
MSUAF

**2015**

*What It Takes*  
campaign goes  
public

**2018**

MSU's 125th  
anniversary  
& completion  
of campaign

**2019**

*What It Takes*  
campaign  
concludes

**M**



## **Alumni Association**

Advances MSU by developing and enhancing lifelong relationships among the university, its alumni, students and friends.

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## **Foundation**

Commits to enhancing the continuing excellence of MSU by attracting private financial support and being prudent stewards of its resources and friendships.

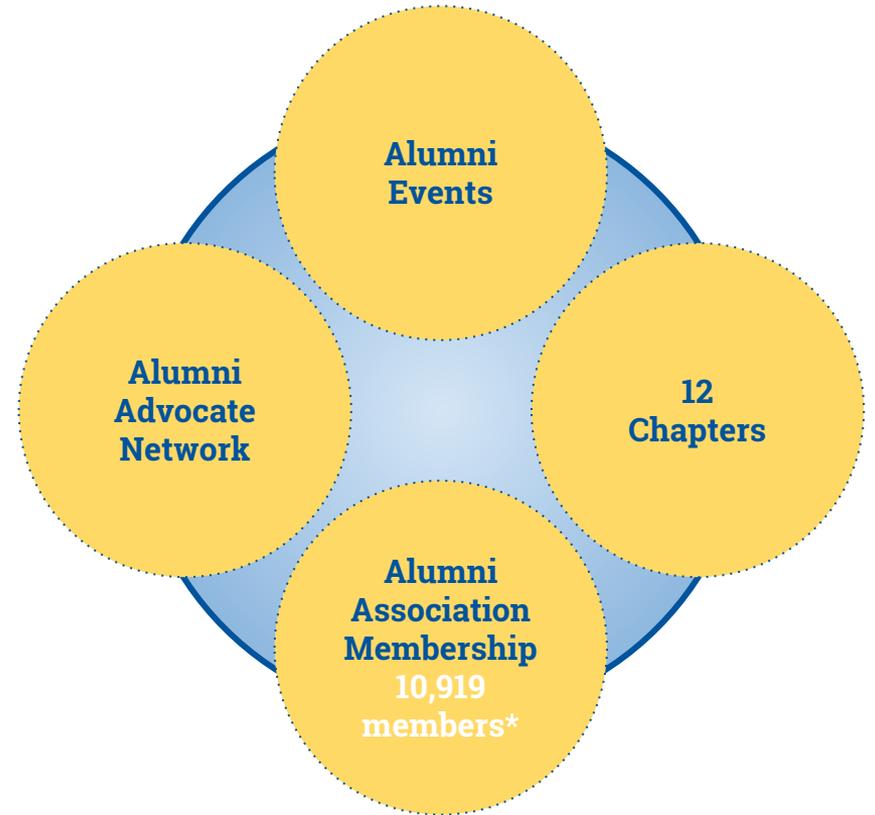
# A powerful partnership

## Montana State University

- Determine funding priorities
- Integrate advancement (programmatic culture)
- Help fund the Foundation
- Support donor, alumni and constituent activities
- Provide data

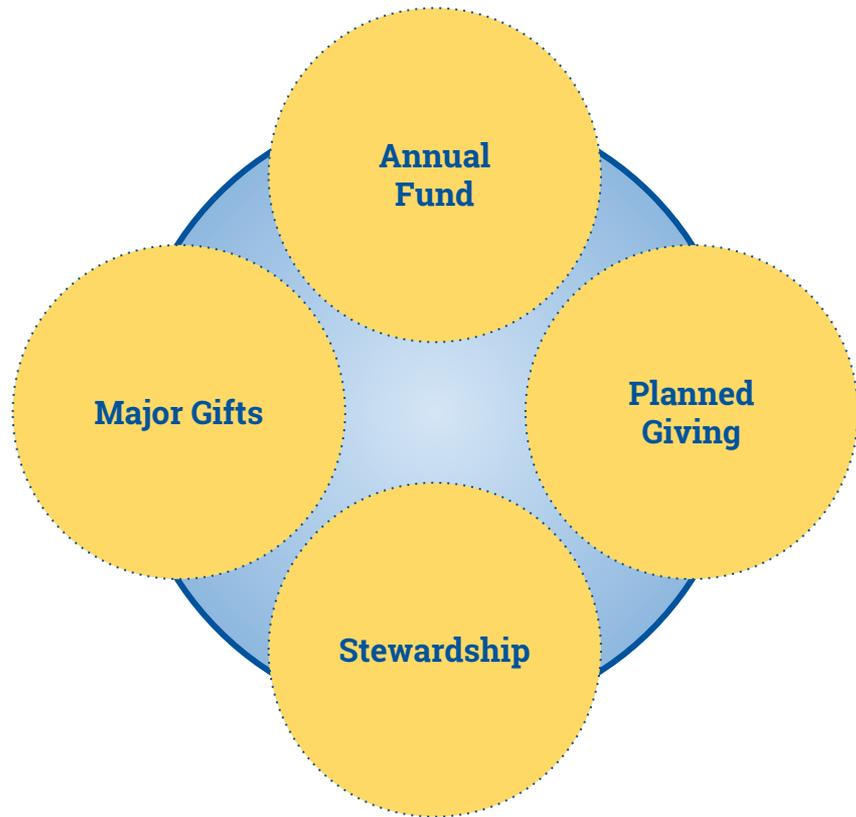
## MSU Alumni Foundation

- Manage alumni relations
- Cultivate donor relationships
- Manage volunteer relationships
- Provide special event services
- Provide communication services
- Administer gift acceptance and acknowledgment process
- Manage constituent data
- Manage and invest assets



\* as of April 15, 2018

# Development



## IDENTIFY

Who might have capacity and interest?

## QUALIFY

Prioritize by:

- Interest
- Connection
- Capacity

## CULTIVATE

Inform, engage and inspire the prospect

## STEWAR D

Tell the donor about the positive impact of their gift

## REPEAT

Is prospect ready to respond to a specific gift proposal or amount?

## SOLICIT

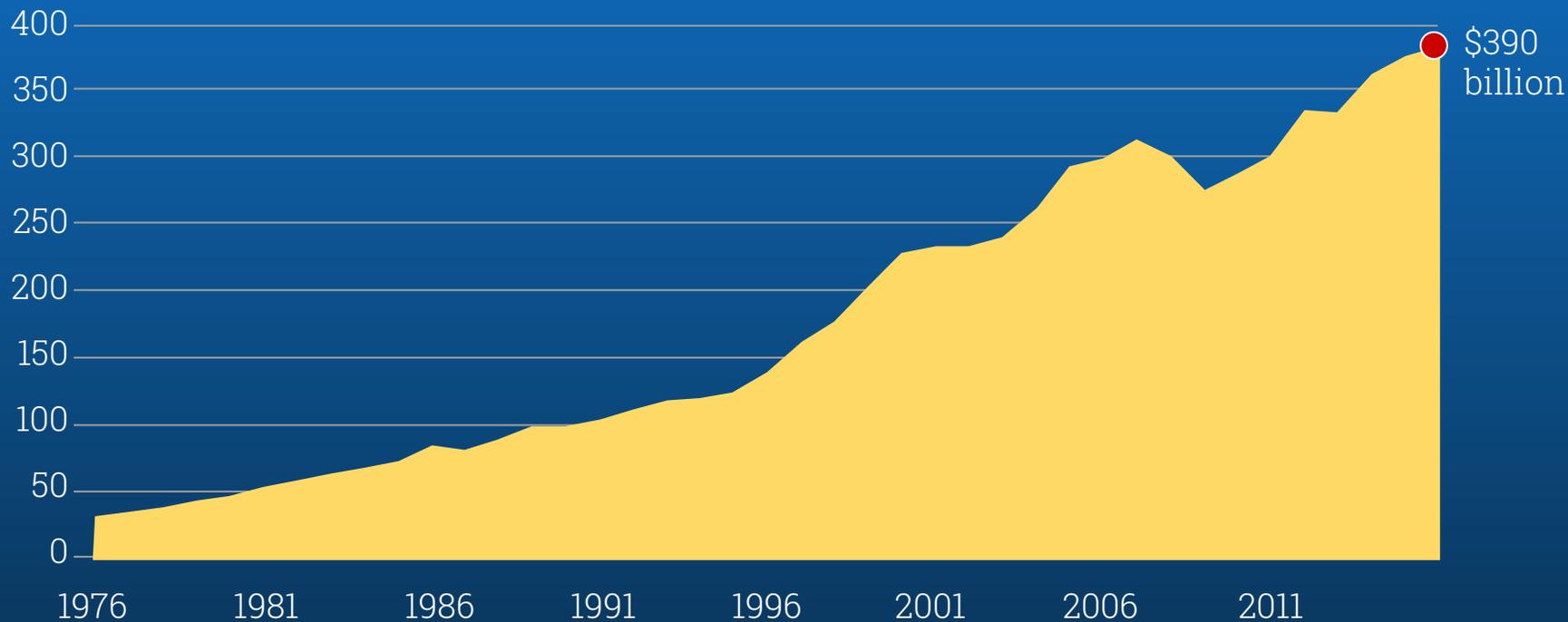
Thank the donor and then thank them again

## ACKNOWLEDGE

# The donor lifecycle

# Perspective on national trends

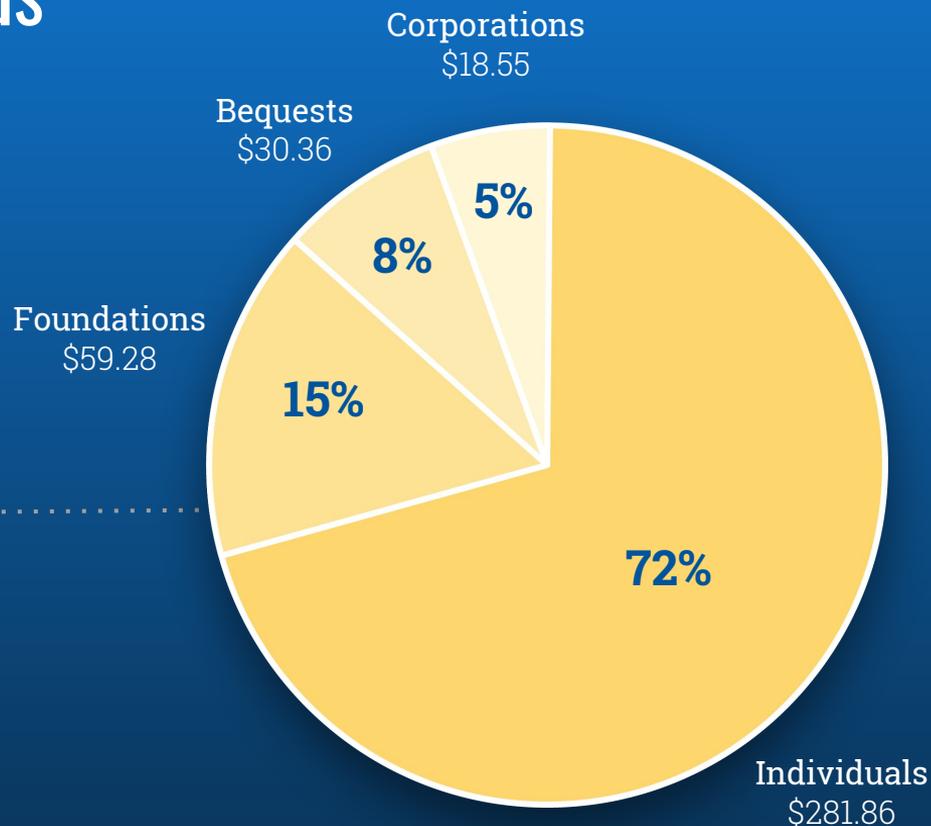
Total giving, 1976-2016 in billions of dollars



SOURCE: Giving USA Foundation

# Perspective on national trends

2016 contributions: \$390.05 billion by source  
(in billions of dollars, rounded)



*WHAT*  
*IT TAKES*

The Campaign for  
MONTANA STATE UNIVERSITY

8.5 years

\$300 Million Goal:  
People, Places, Programs

Urgency, organization, brand building

# Funding priorities

Set by the President

Process begins with the deans and makes its way to the provost

Opportunistic projects – sometimes from the donor sometimes, from campus (VP Development)

# Working with major donors

Staff led – portfolio management

Donor-centered

Role of Development staff – unbiased donor advocate

5% of donors provide 95% of funding

It's all about relationships

Gift payout is determined by a gift agreement with the donor – contract

Endowment or current

Endowment funds are pooled and invested – 4% annual payout

Reports and counting

# What does it mean to you?

You are an ambassador for MSU

You are the content expert

You provide passion, expertise and build confidence in your program and in MSU

Examples

Questions?





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