MSU Department Head Retreat

Fundraising & Working with the MSU Alumni Foundation

June 7, 2018

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
Alumni Association

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

Foundation

Commits to enhancing the continuing excellence of MSU by attracting private financial support and being prudent stewards of its resources and friendships.
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<tr>
<th>Montana State University</th>
<th>MSU Alumni Foundation</th>
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<tbody>
<tr>
<td>● Determine funding priorities</td>
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<td>● Integrate advancement (programmatic culture)</td>
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<td>● Help fund the Foundation</td>
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<td>● Support donor, alumni and constituent activities</td>
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<td>● Provide data</td>
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<td>● Manage alumni relations</td>
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<td>● Cultivate donor relationships</td>
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<td>● Manage volunteer relationships</td>
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<td>● Provide special event services</td>
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<td>● Provide communication services</td>
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<td>● Administer gift acceptance and acknowledgment process</td>
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<td>● Manage constituent data</td>
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<td>● Manage and invest assets</td>
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Alumni
Events
12 Chapters
Alumni Advocate Network
Alumni Association Membership
10,919 members*

* as of April 15, 2018
Development

- Annual Fund
- Major Gifts
- Planned Giving
- Stewardship
The donor lifecycle

IDENTIFY
Who might have capacity and interest?

QUALIFY
Prioritize by:
- Interest
- Connection
- Capacity

CULTIVATE
Inform, engage and inspire the prospect

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

ACKNOWLEDGE
Thank the donor and then thank them again

STEWAR D
Tell the donor about the positive impact of their gift

REPEAT
Perspective on national trends

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

- Corporations: $18.55 (5%)
- Bequests: $30.36 (8%)
- Foundations: $59.28 (15%)
- Individuals: $281.86 (72%)

SOURCE: Giving USA Foundation
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?