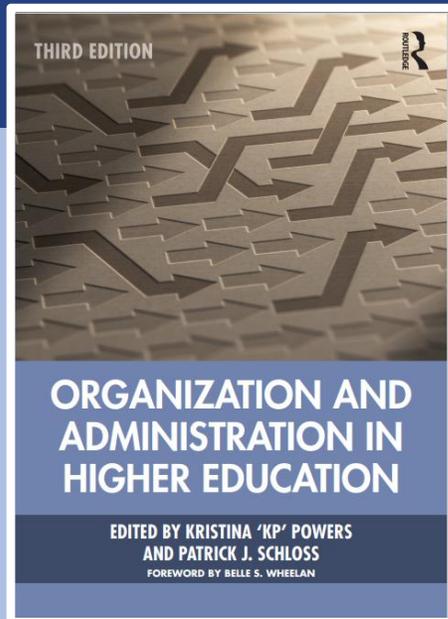


Organization and Administration in Higher Education – 3rd Edition



Chapter Guide

Chapter Nine:

Shaping Philanthropic Efforts That Support Institutional Priorities

Chapter Authored by:

John D. Crawford, MBA

Kristina 'KP' Powers, PhD

- Chapter guide created by: [The Institute for Effectiveness in Higher Education \(IEHE\)](#).
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Abstract

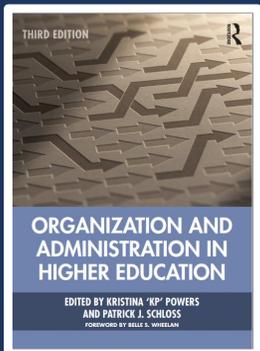
This chapter focuses on development and fundraising in institutions of higher education.

Key topics range from establishing fundraising goals to designing and managing annual and capital campaigns.



Chapter Authors

Chapter 9: Shaping Philanthropic Efforts That Support Institutional Priorities



John D. Crawford, MBA
Principal
Coleman Talley Strategies



Kristina 'KP' Powers, PhD
President
Institute for Effectiveness in
Higher Education

John D. Crawford, MPA

Principal – Coleman Talley Strategies

Co-author of *Shaping Philanthropic Efforts That Support Institutional Priorities in Organization and Administration in Higher Education – 3rd Edition*

John D. Crawford is Vice President for University Advancement at Valdosta State University and the CEO of the VSU Foundation, Inc. He has been instrumental in the planning and execution of several university capital campaigns. Most recently he was responsible for Valdosta State's Invest, Ignite, Inspire capital campaign which exceeded its initial goal by 43%.

He has significant experience in identifying, cultivating, soliciting major gift prospects, and has negotiated and closed multiple six, seven, and 8-figure gifts. He is a regular presenter at fundraising conferences and is an active member of the Council for the Advancement and Support of Education (CASE), as well as the Georgia Education Advancement Council (GEAC).



Kristina 'KP' Powers, PhD

President – Institute for Effectiveness in Higher Education

Co-editor and Co-author of Understanding the Range of Postsecondary Institutions and Key Quality Indicators, Effectively Managing Human Resources in Colleges and Universities, The Nature and Role of Budget Processes, Overview of Accreditation, Shaping Philanthropic Efforts That Support Institutional Priorities in Organization and Administration in Higher Education – 3rd Edition

Kristina 'KP' Powers is President of the Institute for Effectiveness in Higher Education. KP has served in leadership roles in colleges and universities for over 20 years, primarily in the areas of institution accreditation, institutional effectiveness, institutional research, financial planning, and strategy. Her research and practice focus on effective and efficient use of resources to advance higher education organizations.

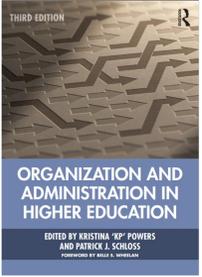
Dr. Powers also serves as a national IPEDS trainer and has current appointments to the National Postsecondary Education Cooperative (NPEC), the NC-SARA Data Advisory Committee, the Journal of Postsecondary Student Success editorial board, and the SUNY Brockport Dean's Advisory Council. Throughout her higher education career, Dr. Powers has taught undergraduate and graduate students as well as delivers professional development presentations, workshops and trainings in all modalities (face-to-face, online, and hybrid) on accreditation, institutional effectiveness, institutional research and higher education organization and administration, IPEDS, financial planning, and strategy.

KP earned her doctorate from Florida State University in Educational Leadership and Policy Studies with a concentration in Higher Education Policy, a Master's in Higher Education Administration from Florida State University, and a Bachelor of Science from the State University of New York, College at Brockport. Her books, *Organization and Administration in Higher Education* (third edition – 2022), *Data Strategy in Colleges and Universities* (2019), and *Cultivating a Data Culture in Higher Education* (2018) are published by Routledge. She has served as issue co-editor and author for *New Directions of Institutional Research*.



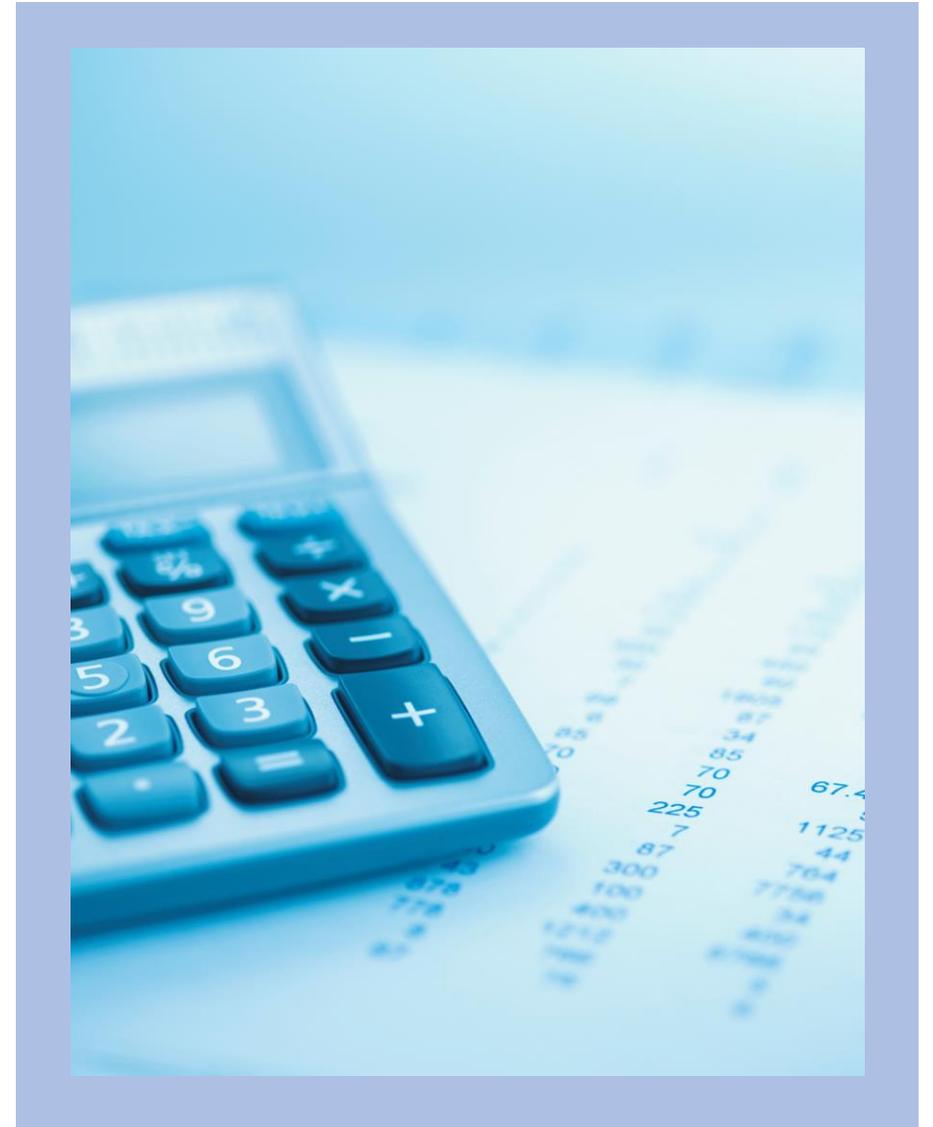
Chapter Outline

1. Introduction
2. Staffing a Development Office
3. The Database and Prospect Research
4. Developing the Case for Support
5. Prospect Rating and Aligning Donor and University Interests
6. The Role of Presidents, Vice Presidents, Academic Deans, and Volunteers in Fundraising
7. The Solicitation Meeting
8. Four Phases of a Major Gifts or Capital Campaign
9. Conclusion



Overarching Principle

Philanthropic support for colleges and universities has become critical during economic uncertainties and declines. In an era of regular uncertainty due to the pandemic along with declining enrollments, advancement divisions have moved from the fringes of the institution to in many instances a central role in its administration.



Advancement Services Components

Database and research staff

Corporate and foundation staff

Planned-giving staff with specialized knowledge in gift strategies

Annual-giving staff

Gift-processing and accounting staff



Linkage, Ability, and Interest Method

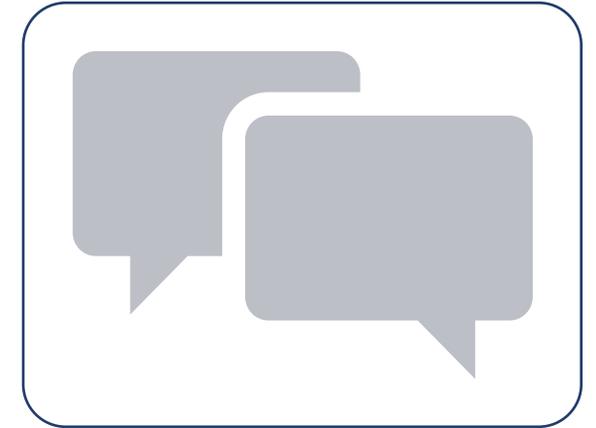
The following are the most commonly identified forms of prospect research.



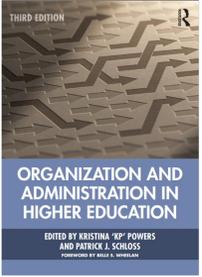
*Electronic
Screening*



*In-House
Review of
Data*



*Peer
Evaluations*



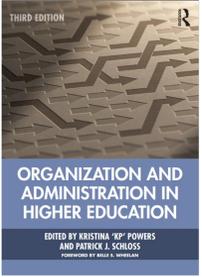
Prospect Rating and Aligning Donor and University Interests

(1) a prospect's interest in or affinity for a college or university

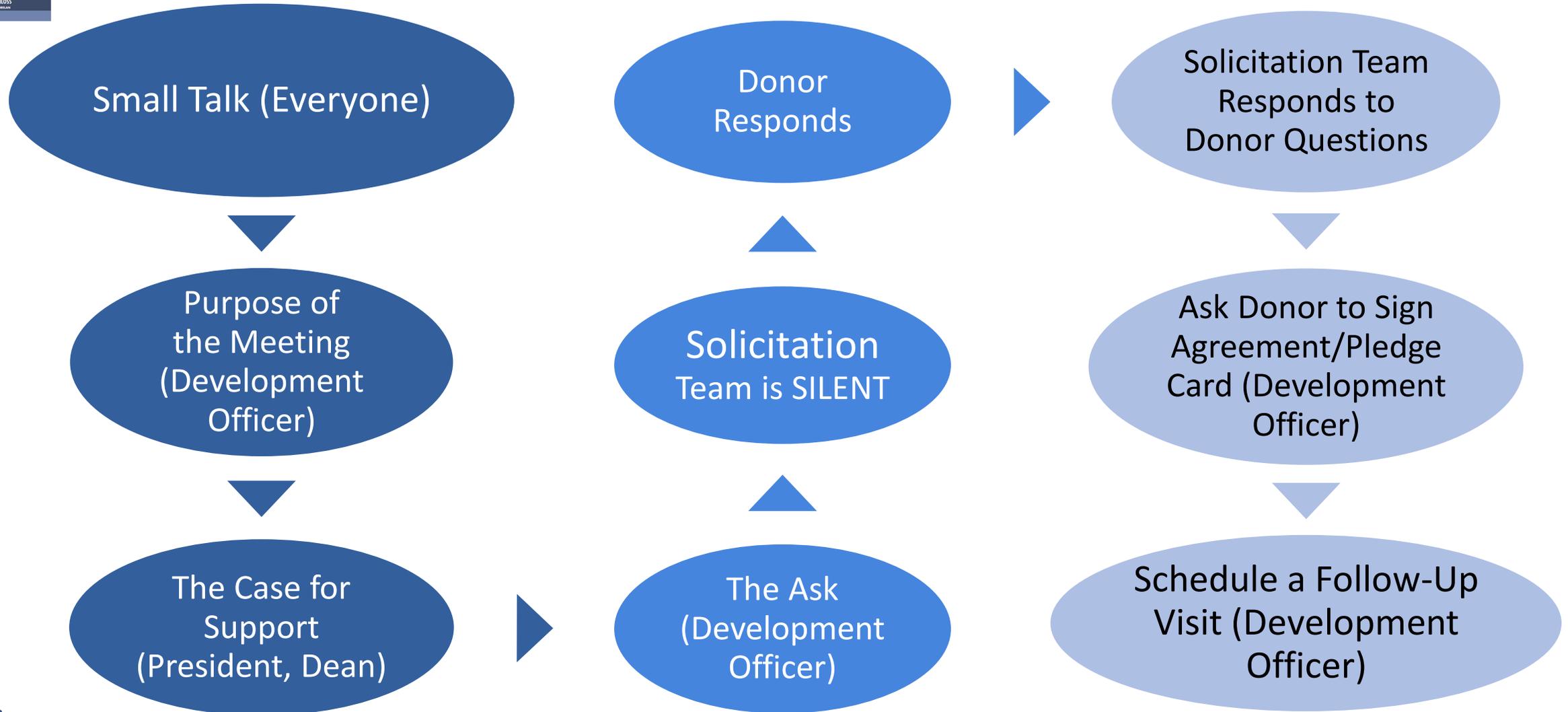
2) the level of interest or affinity

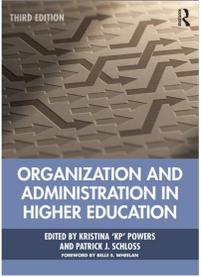
3) the ability of a prospect to make a gift

(4) the area or project in which the prospect is most interested.



The Solicitation Meeting





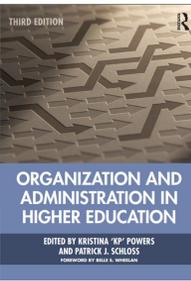
Phases of a Capital Campaign





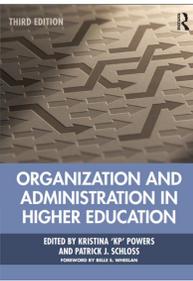
Discussion Prompts

Discussion Prompts



1. Describe some of the more creative fundraising efforts you've seen colleges and universities employ. Which worked well? Did some campaigns flop? If so, what are some ways they could have improved their chance of success?
2. Donors at all levels want to be more engaged (rather than just write a check). They want to know that their money was meaningfully used. What are ways in which you and your department could engage potential donors, thus collaborating with the foundation office?
3. Name five characteristics of a successful development officer. What skills does a person need to have (or cultivate) to become an exceptional fundraiser?

Discussion Prompts



4. What information would you seek as you are learning about a potential donor for your college/university? What do you think would be helpful to you as you court their investment? Is there any information that you think should be off-limits in this effort?
5. What kind of fundraising effort makes the most sense to you – gathering small donations from a large number of stakeholders or focusing on large donations from just a few? If you had to engage in one of these efforts yourself, which would you find more challenging and why?
6. The pandemic highlighted the challenges of heavy dependence on philanthropy for institutional survival. What changes do you think development offices have made to ensure that a similar catastrophic event won't dramatically impact the institution?

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