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Robert Burdenski Annual Giving

Bob's Latest Annual Giving Departures

March 2004

Work is well underway on the next "Innovations" book, and even though the next group of featured schools all reside outside the U.S., thanks to email it's easy to connect with them. It's exciting to contact schools in England, France, and Australia and hear that they've got a copy of the first Innovations in Annual Giving book sitting in their office. (My Mom's thrilled... now if she only understood what development was...)

Good news about alumni giving in 2003 has just been reported by the Council for Aid to Education, and CASE has just completed a survey that shows email continues to ease its way into the annual giving program. See you on the road...

Alumni Giving Bounced Back In 2003, According To CAE



Contributions to colleges and universities in the United States remained level during 2003, stabilizing following a decline a year earlier that

was the first reported since 1988, according to an annual survey released by RAND's Council for Aid to Education (CAE). Private gifts to higher education amounted to \$23.9 billion for the fiscal year that ended June 30, 2003, according to the study. Alumni contributions rebounded from the sharp decline of the previous year, while non- alumni individuals gave less in 2003.

Gifts for capital purposes, such as endowments, buildings, and equipment, declined by 4.3 percent, the second yearly decline in a row. In contrast, current operations giving, which has increased every year over the past three decades, increased by 4.0 percent, a healthy improvement over the 1.6 percent increase the previous year, according to the report.

The study also found that Harvard University raised more money from private donors than any other university, amassing \$555.6 million in gifts. Harvard was followed by Stanford University, which raised \$486.1 million, and the University of Pennsylvania, which raised \$399.6 million.

[Read the full text of the CAE press release here...](#)

The Latest Departures:

- **Alumni Giving Bounced Back In 2003, According To CAE**
- **If You've Got Volunteers, Then Say So**
- **Emory's Senior Tribute Fund Allows Students To Give In Honor Of Favorite Faculty**
- **Lilly "Challenge" Matches Gifts Totaling \$115 Million To Indiana Colleges and Universities**
- **CASE Survey Examines Email Appeals' Growing Appeal**
- **SUNY Pushes For Greater Control Over Alumni Associations**
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If You've Got Volunteers, Then Say So



It's a lot of work to round up class agents, reunion committees or whatever groups you involve in your fundraising. I don't think many institutions properly inform their audiences about all of the volunteers that get involved. The fact that they ARE involved sends an important marketing message.

I love this year-end sample from Pomona College, where a representative from every class signs the mailing. I think it's compelling to see visually just how many volunteers contribute to Pomona's fundraising success each year. Pomona sure goes to a lot of trouble to engage them, so they might as well show them off.

A good class agent will be known to his/her classmates, but show your alumni there are lots of others involved, too. Remember - teach your prospects how you want them to behave, and create your own culture!

[Download a copy of Pomona's year-end class agent appeal here \(pdf format\)... »](#)

Emory's Senior Tribute Fund Allows Students To Give In Honor Of Favorite Faculty



For its departing gift to the University, the College Class of 2004 will follow in the footsteps of last year's senior class by encouraging graduates to contribute money to the Senior Tribute Fund. The Fund, established by the Class of 2003, provides need-based scholarships for future undergraduates and is governed by a council of 13 College seniors.

"The Tribute Fund is a wonderful opportunity for the Class of 2004 to give back to Emory," said Brock Matthews, director of annual giving for young alumni and students. "While many of the past gifts enriched the beauty of the campus, few had a direct impact on individual students' lives." Contributing seniors receive a certificate of participation from the Fund and have their names engraved on a plaque in the Miller-Ward Alumni House.

Seniors can choose to donate funds in the name of individuals who have made profound impacts on their educational experiences. Honored individuals receive a personalized note from the Senior Tribute Council notifying them that a donation to the fund was made in their honor.

[Read the full text of this Emory Wheel article here... »](#)

Lilly "Challenge" Matches Gifts Totaling \$115 Million To Indiana Colleges and Universities

When the Lilly Endowment issued a \$3.5 million fund-raising challenge to each of the state's 38 colleges, the effect was like handing every university a mammoth megaphone, Daniel Elsener said.

"When you tell your story, people want to invest," said the president of private Marian College. And invest they did, often at record levels, despite the state's struggling economy.

From June 2002 to December 2003, Indiana colleges raised more than \$446 million

from alumni, faculty and staff, parents and students. The endowment, which had pledged to match up to \$133 million if every college were to meet the goal, is matching \$115.9 million.

The University of Notre Dame led the way, raising \$163 million during the 19-month period. But some of the state's smallest colleges, including Marian and Oakland City University, also were among 26 colleges that reached or exceeded the \$3.5 million goal.

[Read the full text of this Indianapolis Star article here... »](#)

CASE Survey Examines Email Appeals' Growing Appeal



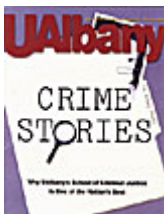
In July 2003, CASE launched its first survey on the use of e-mail fund-raising appeals. The survey was distributed by e-mail to several hundred CASE members, as well as the 1,700 members of the FUNDSVCS and ADVANCE e-mail forums.

CASE received 125 responses. The trends were almost identical to those identified by Robert Weiner in a previous survey. Nearly all respondents work in a central Development office. Most respondents work at schools raising less than \$50 million annually. Slightly over half (57%) of the respondents are currently using e-mail for fund raising. 83% of them have been using e-mail appeals for less than two years. 70% are raising less than \$10,000 via e-mail annually. Three respondents reported raising over \$50,000 annually.

Of the 43% of institutions that are not using e-mail for fund raising, 55% said they plan to begin doing so. Most of them plan to do so within the next year.

[Read the full text of this CASE article and download the full survey results here... »](#)

SUNY Pushes For Greater Control Over Alumni Associations



After battling its campuses on issues ranging from standardized tests to presidential searches, the State University of New York's central administration now wants more control over alumni associations.

SUNY officials have for the past several months been contacting alumni associations across the state to inform them of new guidelines that give the campuses a greater voice in the associations' activities and finances.

This trend, which has been seen in other state university systems as well, soon may surface at the University at Albany, where leaders of the school's 128,000-member alumni association have been asked to sign off on the guidelines.

UAlbany's newly named interim president, Admiral John Ryan, comes into his job fresh from a pitched battle over control of the alumni association at SUNY's Maritime College, where he still serves as president.

[Read the full text of this Albany Times Union article here... »](#)

Subscribe To Fundlist And Join The Discussion



FundList has existed for ten years and is the largest email listserv for fundraisers in the world - with more than 2,000 subscribers. It's my third year serving as the moderator of this great annual giving resource. Subscribing is easy, and message postings are completely spam-free!

If you're not familiar with a listserv, subscribers can post questions to the FundList mailbox. Your question gets sent out to FundList's 2,000 subscribers, and you'll receive responses in reply from those who have something to offer. It's a great way to keep abreast of the latest issues in annual giving, and a great way to keep informed about the best new ideas as well.

FundList subscribers additionally enjoy access to the FundList Briefcase - an on-line repository of direct mail pieces, telemarketing scripts, program plans, and hundreds of other samples shared by dozens of institutions through FundList over the years.

Give it a try - It's all free.

[Learn more about FundList here... »](#)

CASE Webinar Featured Among Bob's Upcoming Presentations



The Bob CASE book, *Innovations in Annual Giving*, will be featured in 2004 as part of the ongoing CASE Online Speaker Series. The first session, scheduled for Wednesday, April 14th, will feature an overview of the book, as well as a special discussion on donor surveys and their use in annual giving.

My special guests for the April 14th session will be Laurent "Lo" DeJanvry of the University of California-Berkeley Cal Fund, and Mari Aylin of St. Olaf College. Both schools have recently conducted alumni giving surveys and Lo and Mari will discuss some of their findings. Other upcoming presentations include:

May 21, 2004 - Meeting of the Minds West Coast Annual Giving Conference at Cal Poly Pomona - What's Happening: Trends in U.S. Philanthropy --- July 19, 2004 - Sharing the Annual Fund Fundamentals (STAFF) Conference at Union College (Members Only) - Reactivating Lapsed Donors ---

July 26, 2004 - Ruffalo CODY Users Group Conference Westin Hotel, Downtown Chicago, Illinois Topic To Be Announced --- November 16, 2004 - AFP Southern Colorado Chapter Workshop Topic TBA

[Get more info about the CASE Webinar here... »](#)

"Innovations In Annual Giving" Available At the Case Web Site



CASE happily reports that 78 copies of *Innovations in Annual Giving* were sold at the recent CASE/NAIS independent schools conference in Washington, D.C. Here are some recently-received testimonials for Bob's book:

"Innovations in Annual Giving will provide those managing mature annual funds in the UK with a host of ideas and a broad focus to consider how they may wish to take their programmes forward." -- Hamish Stewart, Head of the UCL Annual Fund, University College London

"Besides the furor of new ideas it has generated, the book itself has become invaluable when approaching the many different academic units that we support and offering alternative options to the standard approaches." -- Laura Lucas and Tim McLaughlin, Mizzou Annual Fund, University of Missouri

"More Innovations in Annual Giving," featuring ten international "departures," will be available in December, 2004.

[Order "Innovations in Annual Giving: Ten Departures That Worked" here... »](#)

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