



# Searching for Mr. and/or Ms. Money Bags

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# Disclosure Statement

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	<b>Kenn Apel</b>	<b>Judith Vander Woude</b>	<b>Linda Jarmulowicz</b>
<b>Financial</b>	Received Registration Waiver	Received Registration Waiver	Received Registration Waiver
<b>Non-Financial</b>	NA	NA	NA

# Agenda

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Strategies for fundraising

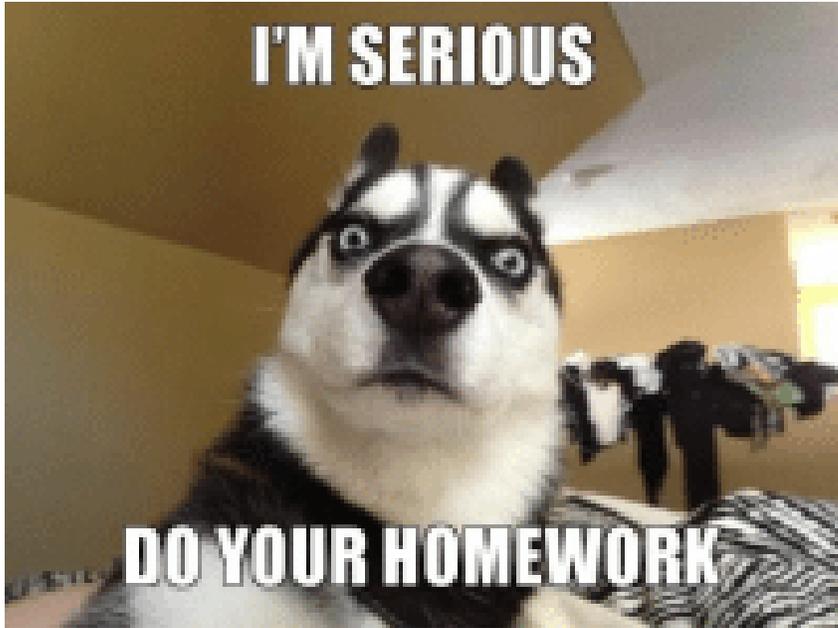
- Our experiences with those strategies

Potential hesitations about fundraising

Discussion

# Strategy #1: Building Relationships with Donors

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- Instead of (only) thinking your role is to obtain funds/donations, consider the notion of building relationships with potential donors
  - Good relationships can last for years
- Do your homework
  1. What types of donations/contributions have the donors given before, if any?
  2. What are the development officers' short- and long-term goals for the donor?
  3. What can you learn about the donor?
    - Alma Mater?
    - Business and other interests?
    - Common friend or colleague connections?
    - Personal attributes?

# Strategy #1: Building Relationships with Donors

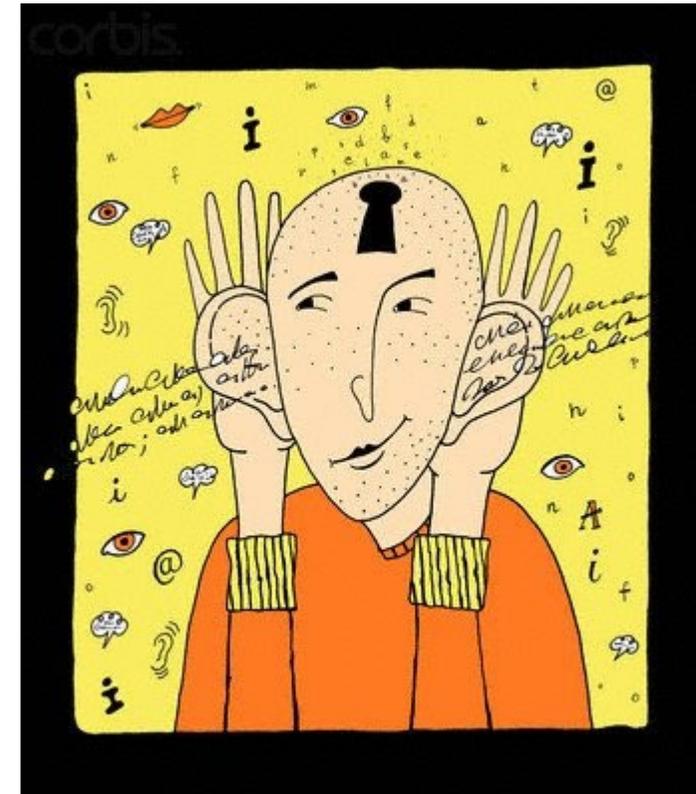
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Listen to potential donors:

- Use your homework to connect
- Use the 80/20 listening/speaking rule
- Learn from the donor; use your intellectual curiosity
- If appropriate, find a small gift that fits the donor perfectly
- Authentic listening leads to credibility

Develop your credibility

- Know your academic, clinical, and research programs well
- Ensure that you can answer all or most questions
- Develop a one-page “ask” with different levels of giving
- Collaborate with others



[http://2.bp.blogspot.com/\\_zPEPyx5SH9Q/SgilJT32T8I/AAAAAAAAAGc/flsiqJyr7CM/s400/Listening.jpg](http://2.bp.blogspot.com/_zPEPyx5SH9Q/SgilJT32T8I/AAAAAAAAAGc/flsiqJyr7CM/s400/Listening.jpg)

# Our Experiences with Strategy #1

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## Kenn

- Already had one ongoing relationship with a donor, so that sped up the process
- Trying to cultivate other relationships
- Had to update myself on some clinical and research facts so I could be “fluent” on those topics

## Judy

- Primarily supports others who have established relationships with donors  
Examples: Summer Literacy Camp, IPE clinic, AAC program
- Also needed to update myself on facts
- Learned the hard way about not doing my homework

## Linda

- Just beginning to build relationships
- Starting with connections through faculty, existing programs, and our Board

# Strategy #2: Focus on How Funds Will Meet Certain Needs

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## Know your needs

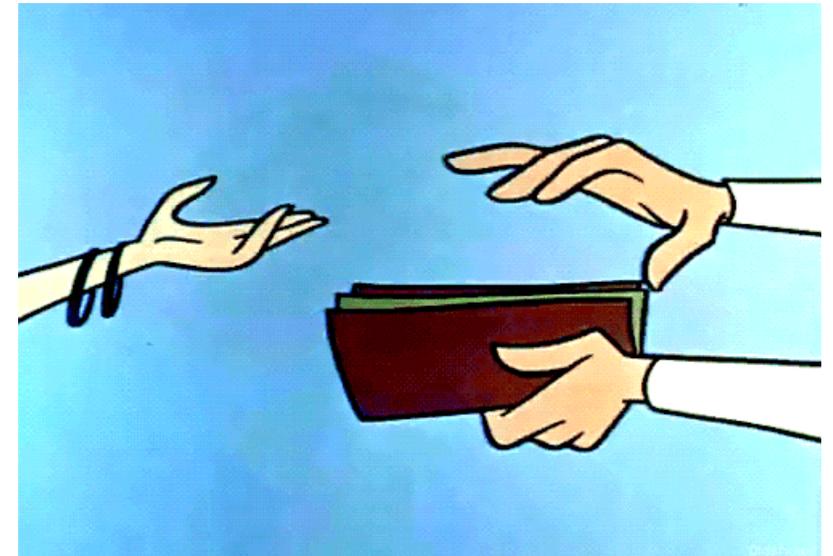
- Have a set of specific objectives
- Continually create stories for your program's needs
  - Social media, brochures, videos

## Determine which needs fit your donor's values/visions

- Can provide a donor some choices among your needs/objectives

## Discuss how the needs of your program will be met via a donor's gift

- How does it help students? Clinic/clients? Research?
- What could be accomplished for the program, students, and/or the profession?
- Depending on the project, how will the program be sustained beyond the gift?



# Our Experiences with Strategy #2

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## Judy

- AAC program example
  - Created three personal stories to share: pilot program
  - Focused on educating professionals for the future along with serving those in need
  - Found the ethos in the situation along with facts
  - Avoided too much detail/jargon

## Linda

- Developed [CSD Project Charter](#)
- Benefits: clarity of purpose, clarity of allocation, “fundraising gold”

## Kenn

- Upcoming move made discussion of “needs” easier
  - Had large floorplan; used it to talk about benefits to students, clinic, and research
- Found out potential donors’ values/vision via either first or second hand sources

# Strategy #3: Don't Work Alone

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Meet with and collaborate with your development officer(s)

- Development officer has been trained in how to ask
- Recognize the knowledge base you each bring to the task
- See it as a partnership of knowledge of “the ask” and knowledge of the content



# Strategy #3: Don't Work Alone

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Consider developing and working with an advisory board

- Choose the right individuals
  - They should have some understanding of the profession and your program
- Communicate well with them
  - Spend time helping them understand your program and helping you brainstorm on one or two department “issues”
  - Provide updates on the advice they give you as well as general department updates



# Our Experiences with Strategy #3

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## Linda

- No designated development officer, but we have a recently reconstituted Board of Directors
  - The BoD members have the connections, I provide the talking points
  - Meet & Greet to generate enthusiasm
  - Support to date: Part time staff, Client Assistance Program, equipment, faculty training

## Kenn

- New development officer; seemed to know strategies but did not know department at all
  - Held meetings with potential donors first before involving development officer
  - Advisory Board idea was a bust

## Judy

- Story about a collaborative success

# Strategy #4: Know the Time You Can Dedicate

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Fundraising can take up to 5-10% of your time, depending on the target activity

Courting a donor takes time; it rarely happens quickly (need to build relationship)

- Donors need to know how their funds benefit different aspects of your program
- Requires patience on your end
- Allow small donations to turn into larger donations

Be aware of best use of your time

- Social media “asks” may not lead to great outcomes
  - Challenge is the lack of personal connection
- Know which donors might be best to court
- Alumni may not always be the best donors



# Our Experiences with Strategy #4

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## Kenn%

- I was impatient; requests were time-sensitive
- Felt the need to “push” development officer
- Social media requests were a bust

## Judy

- Also impatient
- Learned the need to strategically plan forward
- But don't ignore opportunities that arise unexpectedly

## Linda

- Frequent reminders to Development
- Monthly Board meetings

# Strategy #5: Use All Available Resources

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## Your faculty

- Your faculty may be the best sources for identifying potential donors
- You can provide faculty with key strategies in case some conversations with potential donors come up
- You should have regular conversations about fundraising
- Let faculty know that you are a resource before and/or after a conversation may have occurred

## Your development officer

- S/he can provide you with tips/strategies you can use when “conversations” arise
- Determine whether s/he can provide a short tutorial for you/your faculty

# Our Experiences with Strategy #5

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## Linda

- Faculty tend to refer/defer to me
- Board is a resource, but still under development – good community connections
- Communicate success

## Kenn

- Faculty provided great leads
- Held updates routinely at faculty meetings
- Felt like most common statement was: Is s/he rich? ;)

## Judy

- Ditto, except our most common comment has been: “We need a sugar momma or sugar daddy!”

# Top “Uncertainties” of Fundraising

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What if I am the one asking for funds?

- Have set amounts if asked
- Rely on your development officer for the request function
- Suggest that the “ask” moment include more than one person at the meeting

What if the donor has a request for which I’m unsure I can deliver?

- Be as honest and transparent as possible
- Rely on your development officer for this function
- Don’t do it or reshape it to fit

Won’t it be uncomfortable having donation conversations?

- Do your homework re: the donor and his/her interests
- Know that it becomes easier with experience and support

# Tricky Part: Clients (and their family members) as donors

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Be aware of HIPPA issues

Provide some “public” information about fundraising goals

Have clinical faculty share goals and ask about others contacting the client/family

# Discussion

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- What has worked for you?
- What hasn't worked?
- Advice?

# References

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