

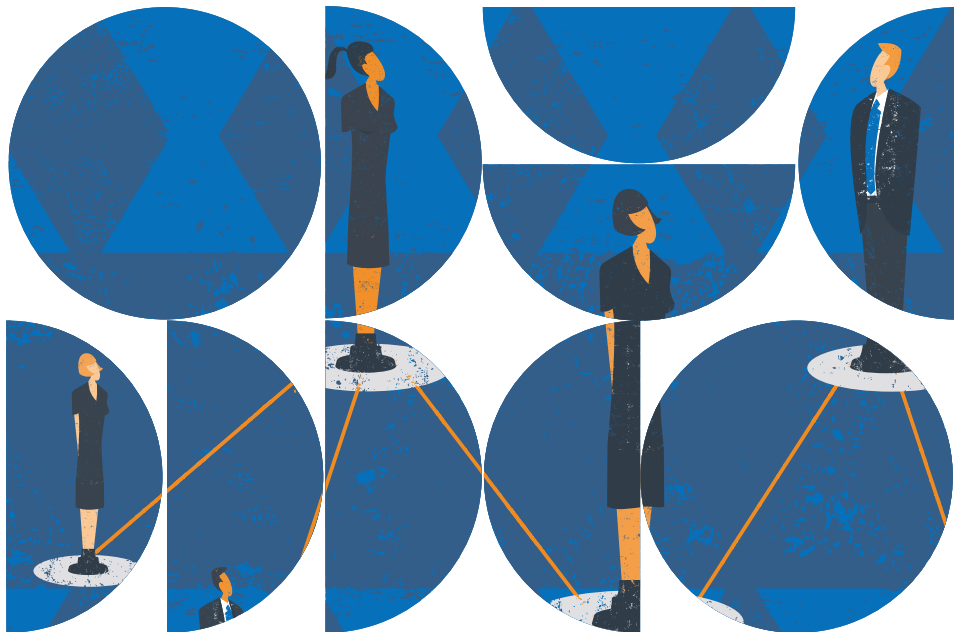


EAB

The Changing Face of the 21st Century Donor

Working with Diverse Alumni Segments

Advancement
Forum





The Changing Face of the **21st Century Donor**

Working with Diverse Alumni Segments

Advancement Forum

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in engaging with their diverse alumni constituencies. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the Advancement Forum to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

For additional information about any of the services below—or for an electronic version of this publication—please visit our website (eab.com).

Implementation Road Maps and Tools



Throughout the publication, this symbol will alert you to any corresponding tools and templates available in the Toolkit at the back of this book. These tools are also available on our website at eab.com.

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Our website includes recordings of webconferences walking through the practices highlighted in this publication. Forum experts are also available to conduct private webconferences with your team.

Unlimited Expert Troubleshooting



Members may contact the consultants who worked on any report to discuss the research, troubleshoot obstacles to implementation, or run deep on unique issues. Our staff conducts hundreds of telephone consultations every year.

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Our experts regularly visit campuses to lead half-day sessions focused on highlighting key insights for senior leaders or helping internal project teams select the most relevant practices and determine next steps.



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Executive Summary

The America of today is far more culturally, racially, and ethnically diverse than ever before. Demographic shifts are being felt on college campuses as record numbers of first-generation, international, women, and minority students are enrolling in college and attaining degrees. These changing demographics represent significant challenges for advancement offices, particularly in major giving, which has historically focused on a pipeline of traditional white male donors. Advancement and alumni leaders need to not only recognize the need for change, but also create and encourage innovative engagement and solicitation strategies for an increasingly diverse alumni base in order to impact participation and build a pipeline for future gifts.

Diverse alumni share in the common experience that their time on college and university campuses was shaped, in part, by their affinity group. It was not that their experience was less than or somehow inferior to the traditional experience, it was simply different. If advancement leaders want to effectively engage and solicit their growing diverse alumni base, they need to recognize these differences, seek to understand the giving trends and desires of their diverse alumni, and create channels for them to engage not only with the institution, but with each other and current students.

This study examines three key populations where advancement leaders have the opportunity for focused quick wins that will establish groundwork for future alumni giving an engagement.



The Changing Demographics of Higher Education

SECTION

1

More Diverse Than Ever Before

Demographic Shifts Alter Campus and Alumni Composition

Colleges and Universities are more diverse than ever before; population trends and university enrollment projections both indicate that the diversity of college and university campuses will only continue to grow. In fact, the United States is projected to be a majority-minority population by 2044, where minority groups will represent more than 50% of the population. Demographic data from Canada suggests similar trends, notably in large urban areas.

Campus Diversity on the Rise



A New Argument for More Diverse Classrooms



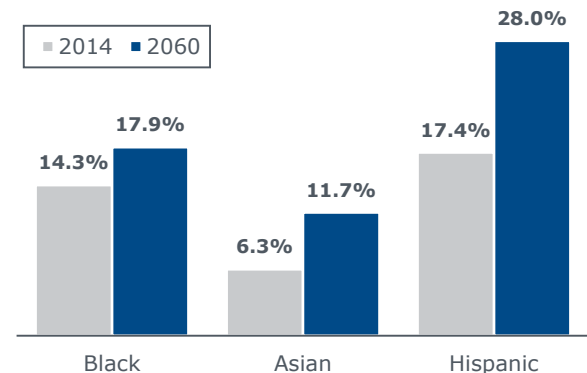
Why Does Diversity Matter at College Anyway?



First-Generation Students Unite

Continued Growth in Diversity

Projections of US Population Demographics



Diversity North of the Border Remains Strong

16.25M

Individuals in Canada who identified as being part of a visible minority group

47%

Percentage of Toronto residents who are members of a visible ethnic minority

20%

Percentage of the total Canadian population who are immigrants to Canada

These demographic shifts represent significant challenges for advancement. Historically, much of the fundraising success in higher education has been built on giving from traditional donors—white, heterosexual couples from the baby boomer or silent generations. In order to build a pipeline of donors for the future, advancement leaders and their teams must learn to engage all populations represented by an increasingly diverse alumni base.

Source: Statistics Canada, [Population and Demography](#), Government of Canada 2016; Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Advancement Forum interviews and analysis.

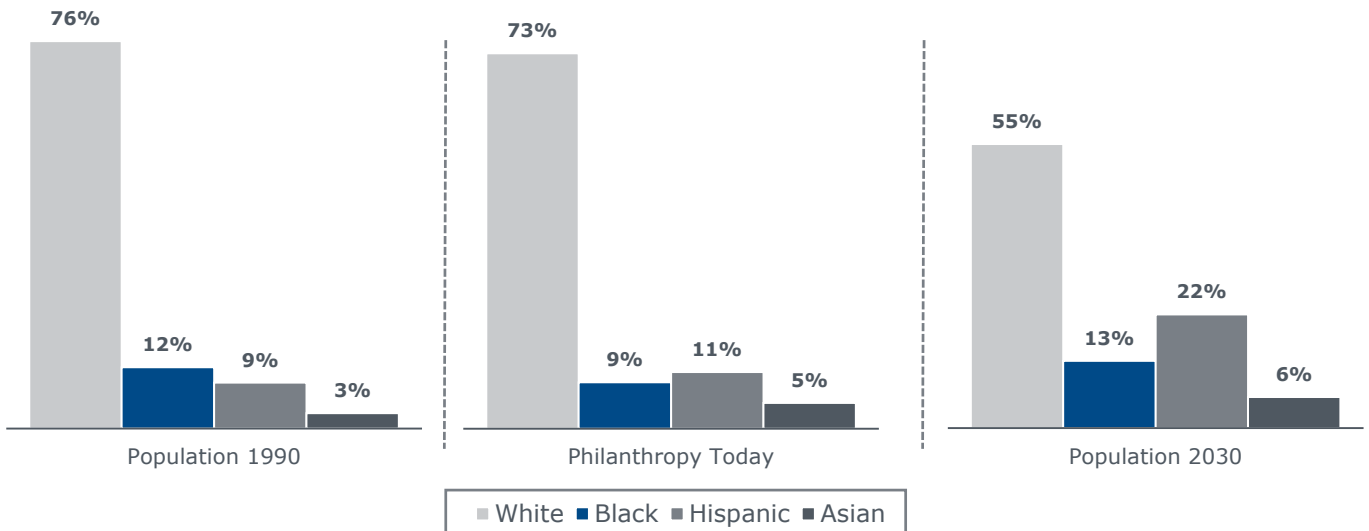
Fundraising Like It's 1990

Donor Demographics Today Look Like America Did Two Decades Ago

As the ethnic and racial composition of North America has changed across the last few decades, research estimates that nonprofit fundraising outreach is behind in engaging diverse communities by about 25 years. The source of philanthropic support in 2016 resembles the population of the United States circa 1990. As the United States continues towards becoming a majority-minority country, it is imperative that advancement teams challenge the status quo and broaden efforts for more inclusive and demographically diverse fundraising practices.

Is George H.W. Bush Still President?

Comparing Population Demographics and Giving Behaviors Today



“Our donors are mostly older men. When we look at that reality alongside our enrollment trends we take great pause. I think the future of higher education fundraising will be much different than we think.”

*Vice President for Advancement
Master's College*

“Our donors look like they always have; lots of shades of white—mostly men. I’m not sure what the future holds, but we can not continue to operate as we do now and expect to see the same returns.”

*Vice President, External
Canadian University*

Source: Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 20Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; 14 Rowner, S. "Diversity in Giving," Blackbaud, 2016; Advancement Forum interviews and analysis.

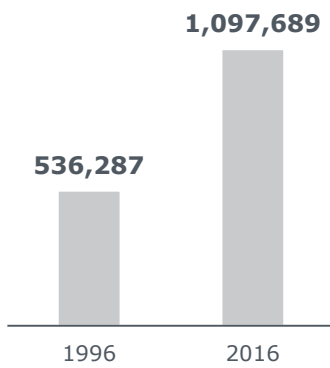
If You Don't Engage Them, Someone Else Will

Nonprofits Experimenting with Initiatives for Diverse Groups

The need to diversify fundraising efforts in higher education is compounded by the explosive growth in the number of public charities across the last ten years. Since 1990 the number of registered charities has nearly doubled. Given this rise, more charities are competing for a relatively constant donor base. As a result, forward thinking charities are developing initiatives targeted at diverse donor segments.

Dramatic Growth in Nonprofit Sector

Number of Public Charities, 1996-2016



“We have seen an explosion in the nonprofit sector in the past decade. We are constantly trying to speak to new and diverse donor audiences.”

Vice President of the Foundation
Regional Nonprofit Organization

Courting Hispanic Donors

Operation  Smile

Changing Lives One Smile at a Time

Multimedia Efforts

- Ran a series of television commercials in Spanish language
- Included more children from Spanish-speaking countries in images
- Ran commercials on *Discovery en Español* and *History en Español*

Direct Mail Acquisition Results

	English	Spanish
Response Rate	0.88%	0.98%
Average Gift	\$20.63	\$22.45

Operation Smile, a global nonprofit that fundraises to support medical operations for children with cleft palates and lips, is one organization experimenting with new ways to connect with Hispanic donors. They recently launched a series of multimedia initiatives that included TV commercials in Spanish, targeted ad buys on different channels (e.g., *Discovery en Español* and *History en Español*), and they also sent out a direct mail piece in Spanish. Operation Smile included a check box on the mailer for donors to indicate whether they wanted to be contacted or receive materials in Spanish moving forward. While colleges and universities may not be able to replicate Operation Smile's work and testing, the reality is that nonprofits are innovating ways to engage diverse donors.

Source: Sandoval, T., "Operation Smile Courts Hispanics With Eye on Population Shift," *The Chronicle of Philanthropy*, May 3, 2016; "Facts About Nonprofits," National Center for Charitable Statistics; National Center for Charitable Statistics, "The Number and Finances of All Registered 501(c) Nonprofits," Advancement Forum interviews and analysis.

Tried-and-True No Longer Works

The Challenges in Engaging Diverse Alumni

While segmented and targeted approaches in multiple languages may not be replicable for advancement, this type of engagement highlights a need to do more with diverse constituents. Status quo engagement and solicitation techniques that have worked for traditional donors in higher education are unlikely to resonate with emerging donor populations.

What unites diverse alumni populations (e.g., Hispanics, blacks, women) is that their experiences on campus were different in meaningful ways from the default donor perspective. Advancement units need to recognize these differences and respond appropriately.

Status Quo Engagement and Solicitation Techniques

- ✘ Country club hosted gala dinner
- ✘ Standard web-based donor portal
- ✘ Alumni weekend solicitations
- ✘ Nonspecific text-to-give campaign



"Why are they asking me to support an endowment, I am not even sure what that is."

"How will this impact students who looked like me?"

"Why are there no women on this alumni panel?"

"I thought things had changed since the 1980s, why are there so few students of color in these pictures?"



A Different Experience

"We have had a lot of great diverse alumni come through our doors. At first glance they don't have very much in common with each other, but upon closer inspection **it is clear that they all share the common bond that their university experience was different than 'the norm.'** Their relationship with us was just different. Maybe better than, maybe worse than, but regardless it was different."

*Vice President for Advancement
Private Research University*

Pressure From All Sides

Majority-Minority on the Horizon, Invest Now to Ensure Sustainability

The need to invest more in diverse engagement and giving competes with the “tyranny of the immediate.” With heightened scrutiny to meet increased fundraising and alumni participation goals, the priority is to focus on the short-term rather than build a longer term strategy to tackle diverse donor populations. EAB research uncovered that it does not have to be all or nothing. Institutions need to take inventory of their work with diverse alumni and understand how they can impact both participation rates and dollars today, while building a stronger pipeline of donors for the campaign of tomorrow.

Tyranny of the Immediate



- Yearly goal
- Campaign launch
- Participation rates
- Board priorities



Diverse Alumni Requirements



- Time
- Effort
- Consistent focus
- Investment



“What Am I to Do?!”

“I know I must do something, but I have pressure coming from all sides, where do I even begin? I fear taking a step in one direction to realize only months later I should have went another way.”

*Vice President, Advancement
Baccalaureate College*

Investing Now for a Stronger Future

“Diverse alumni take a little longer to bring around to the development side of the house. We need to prove to them that the way in which they were treated on campus has changed and will remain so after the check is signed.”

Vice President for Advancement, Public Research University





Attracting Dollars and Participation Today

SECTION

2

'I Depend on Me'

The Growing Financial Clout of Women in the 21st Century

Women today have greater wealth and have longer life expectancies on average compared to men. As a result, women not only have more money in their own right, but also stand to inherit additional wealth from their partners. Boston College's Center on Wealth and Philanthropy estimates that women will inherit 70% of the \$41 trillion intergenerational wealth transfer expected over the next few decades. Recognizing this significant shift, advancement officers need to focus time and attention to cultivate and steward their top female donors.



Greater Wealth

45%

Of American millionaires are women

“**Women have more money now than they ever did before.** That's great news for us, as they are more philanthropic than men– but we have troubling news in that we have not historically engaged them– we have lots of work to do.”

*Vice President, Advancement
Baccalaureate Institution*



Increased Decision-Making

+59%

Growth in female owned businesses since 1997

“**Women are becoming more vocal actors in philanthropic decisions.** In donor households headed by women, we have seen those gifts be substantially larger than those headed by men.”

*Vice President, External
Canadian Institution*



Longer Life Expectancy

70%

Percentage of intergenerational wealth transfer women will inherit

“**Women are living longer and longer than men– and they are not only going to have more money in their own right, they are also going to inherit trillions of dollars** across the next 20 years too!”

*Vice President Development
Master's Institution*

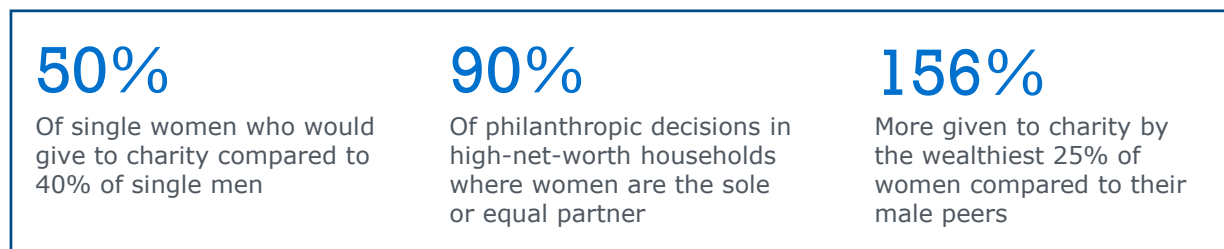
Source: [Women's Wealth and Philanthropy](#), *Women in Leadership and Philanthropy*, Virginia Tech; Advancement Forum interviews and analysis.

Wielding Philanthropic Power as Never Before

Female Donors Hold Significant Potential for University Advancement

The good news for advancement is that women are wielding greater philanthropic power than ever before. Single women are more charitable than single men, and women are either the sole philanthropist or equal partner in 90% of philanthropic decisions in high-net-worth households (i.e., households with more than one million dollars in liquid assets).

However, there is still a lot of work to be done in order to fully engage women as donors. Many myths about women donors persist including that they lack confidence in financial decision making or that they fear outliving their money.



Much Work Still to Be Done with This Segment

Stereotypes About Women Donors

- Lack confidence in financial decision-making
- Need to be taught how to use philanthropy to strategically advance their values
- Aren't comfortable talking about money or fear outliving their money

Structural Barriers

- Heavy reliance on transactional, "match your peers" driven fundraising asks
- Default donor profile in software is single earner, male headed household
- Thank you notes go out addressed first (and sometimes only) to the husband

In addition to these myths, there are also structural barriers that impede advancement's engagement with female donors. Software that defaults to a single earner male head of household or thank you notes that go out addressed first and sometimes *only* to the husband even if the check was written by the wife.

A recent *Chronicle of Philanthropy* article noted that organizations can't afford to continue to make mistakes in female engagement and giving because, "if you don't engage women donors someone else is going to take their money."

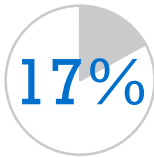
Source: Women's Philanthropy Institute, "[Do Women Give More](#)" (2015); O'Neil, M., "[Women Primed to Give Big](#)," *The Chronicle of Philanthropy* June 1, 2016; Advancement Forum interviews and analysis.

The Times, They Are a Changin'

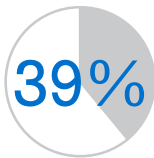
Colleges and Universities Now Have a Far More Diverse Alumni Base

College and university campuses today look very different than they did fifteen to twenty years ago. The single greatest shift colleges and university campuses have experienced in that time period has been in their student enrollments. In 2015, more than one third of all first time student enrollments were students of color. As these demographic shifts continue to play out on college campuses they will continue to shape and impact alumni bases too.

Significant Progress from 1980 to 2014



First-time student enrollments from black, Hispanic, and Asian-American students in 1980



First-time enrollments from black, Hispanic, Asian-American and biracial students in 2014

A Dramatic Leap Forward

“Our Enrollment VP does a presentation for us each year. It is amazing to see the diversity on campus especially compared to where the institution was even just 10 years ago.”

*Vice President Advancement
Master's University*

High-Growth Student Populations, 1980-2014

285%

Growth in **Hispanic** enrollment at colleges

240%

Growth in **black** enrollment at colleges

375%

Growth in **Asian/Pacific-Islander** enrollment at colleges

Source: Source: Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 2014; IPEDS, *National Center for Education Statistics*; Advancement Forum interviews and analysis.

African Americans by the Numbers

Key Data Points and Statistics

Currently African-Americans represent 14% of the population in the US and have a buying power estimated at \$1.1 trillion dollars. Blackbaud's *Diversity in Giving* research found that 66% of black households make charitable gifts each year; the overwhelmingly majority of these gifts go to places of worships. For African Americans, giving to education does not rank in their top three giving causes. It currently ranks eighth out of 20 options tested in the Blackbaud research.

Population

14%

Percent of US population who are African-American in 2016

Capacity

\$1.1T

Buying power of African-Americans in 2015 in the US

Philanthropy

66%

Of black households make charitable gifts annually

Top Philanthropic Causes Blacks Donate To:

- 1 Places of worship
- 2 Local social service organizations
- 3 Children's and health charities (tie)

Church Giving Resonates

"African-Americans give a higher percentage of their income than whites and at a younger age- but they give it to their churches... They don't have to give it to their churches, but they do because the church asks."

Marybeth Gasman, PhD
Professor, University of Pennsylvania

Source: Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 20Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; 14 Rovner, S. "Diversity in Giving," Blackbaud, 2016; Advancement Forum interviews and analysis.

Hispanic Americans by the Numbers

Key Data Points and Statistics

Hispanics are the demographic that is projected to grow the most across the next 30 years. By 2050, 24.5% of the US population will be Hispanic, which works out to be about 96.5 million individuals. Some states, notably California and Texas already have Hispanic populations at or around this proportion. Blackbaud's research estimates that 63% of Hispanics make charitable contributions. Similar to African-Americans, these gifts are often most made to places of worship.

Population

24.5%

Percent of US population who will be Hispanic by 2050

Capacity

\$1.5T

Buying power of Hispanics in 2015 in the US

Philanthropy

63%

Of Hispanics make charitable contributions annually

Top Philanthropic Causes Hispanics Donate To:

- 1 Places of worship
- 2 Children's and health charities (tie)
- 3 Local social service organizations

”

Strong Hispanic Growth

“We are a small Catholic institution and we know that the average age of an Hispanic-American is significantly younger than the average American. This growth will fuel our student and alumni base for years to come.”

Vice President Development, Baccalaureate College

Source: Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 2014; Rovner, S. "Diversity in Giving," Blackbaud, 2016; Advancement Forum interviews and analysis.

Asian Americans by the Numbers

Key Data Points and Statistics

Asian Americans experienced strong population growth from 2000-2012. By 2018, it is estimated Asian-Americans will have around one trillion dollars of purchasing power. Unlike African Americans and Hispanics, places of worship is not the top cause that Asians donate to. Their number one cause is a tie between health and children's charities. For Asians, education is ranked fifth out of 20 giving priorities, higher than any other group in Blackbaud's research including Caucasians. Asians are also the group most likely to make a donation through your website and are twice as likely to donate via crowdfunding. University development offices should recognize these trends and engage Asian-American alumni via only fundraising tools (e.g., crowdfunding).

Population

40%

Growth rate of Asians in the US between 2000-2012

Capacity

\$1T

Anticipated purchasing power of Asian-Americans in 2018

Philanthropy

2x

Greater likelihood Asian-Americans are to donate via crowdfunding than Caucasian peers

Top Philanthropic Causes Asian-Americans Donate To:

- 1 Children's and health charities (tie)
- 2 Local social service organizations
- 3 Places of worship

More Work Ahead

"We need to think more strategically about engaging our Asian alumni. They have capacity. We have not yet invested in this space, but we are going to need to in order to get through our next campaign."

*Associate Vice President, Development
Private Research University*

Source: Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; AND Gasman, M. and Nelson Bowman III, *Engaging Diverse College Alumni: The Essential Guide to Fundraising*, Routledge, 2014; Rovner, S. "Diversity in Giving," Blackbaud, 2016; Advancement Forum interviews and analysis.

Louder and Prouder Than Ever Before

Colleges Can't Ignore LGBT Alumni

Lesbian, gay, bisexual, and transgender (LGBT) individuals are more visible and vocal than ever before. Varying estimates show that between 4-7% of the US population identify as LGBT. Gallup Research highlights that the percentage of U.S. adults who identify as LGBT by state ranges from 1.7% in North Dakota to 5.1% in Hawaii, and 10% in the District of Columbia. Furthermore, every county in the United States has registered same-sex couples living in them. In addition to this sizeable population, it is important to recognize that the median age LGBT individuals come out is 20, making their university and college experience an formative one.



Sizeable Population

4-7%

Estimate of US population who are LGBT

“We keep being bombarded with data about the size of the LGBT population. **It's a tough thing to measure.** Some say it is as small as 2% yet other put it is high as 10%—regardless, the LGBT community is there— and they are in our alumni ranks too.”

*Vice President Advancement
Baccalaureate College*



Formative Experience at University

20 years

The median age when LGBT individuals “come out”

“**LGBT individuals have a different experience while on our campuses.** It's not less than it's just different...many of them are just beginning to finally understand who they are and who they love.”

*Vice President, External
Canadian University*



Increasing Visibility on Campus

+268%

Increase in LGBT Center visitors at Kennesaw State from 2012-2015

“Our gay and lesbian students and alumni have never been louder or prouder in our history. Compounded by the growing volume of allies **we cannot afford to ignore them any longer.**”

*Vice President Development
Master's College*

Source: Pratt, T., “Colleges See Gay Students as a Growth Market,” Time, Sept. 2014; AND “Pew Survey of LGBT Americans,” Pew Research Center, 2015; Advancement Forum interviews and analysis.

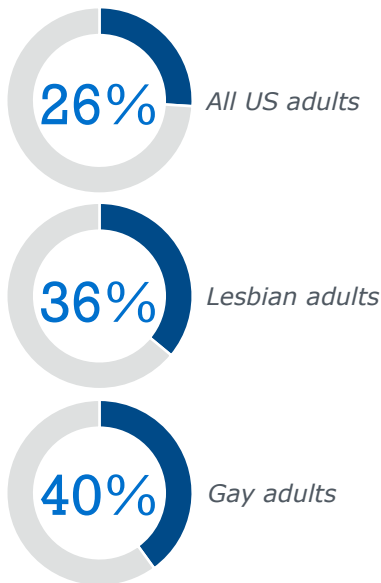
The Impending Transfer of LGBT Wealth

LGBT Alumni Even More Promising Segment Post-SCOTUS

LGBT alumni are a promising segment of the alumni base; they attain undergraduate degrees at a higher proportion than the general public. In the United States, their capacity has been further increased as a result of the *Windsor* decision by the US Supreme Court, whereby they no longer have to pay estate taxes on inheritance from their late spouses. Planned giving officers should think about how this impacts estate planning for their married same-sex alumni donor prospects.

LGBT Alumni Among Your Constituents

Percentage of Population with at Least a Bachelor's Degree



The Simplified Impact of the Windsor Decision

\$182K Estimated average household net-worth
×
~275K Estimated number of married LGBT couples in the US

\$500B Inheritance that will become estate-tax exempt

Ample Discretionary Income

\$500

Forty percent of gay men spend more than \$500 per month on discretionary items

Source: "A Survey of LGBT Americans," Pew Research Center, 2013; AND; Mahaney, J. *Financial Planning for LGBT Couples After U.S. v. Windsor and Obergefell v. Hodges* and "The LGBT Financial Experience," Prudential, 2015; Advancement Forum interviews and analysis.

Taking Center Stage in Philanthropy

LGBT Fundraising Efforts on the Rise

The rise of LGBT philanthropy has become a topic of conversation not only in industry-specific periodicals and publications, but also in mainstream publications such as the *New York Times*. This rise in attention to LGBT philanthropy should not be surprising as LGBT individuals give and volunteer at greater rates than the US average. One historical taboo that has yet to be broken about LGBT donors though; they are not single issue donors. About 50% of their giving is to non LGBT causes including the arts and culture, religion, education, and community centers.

LGBT Giving in the Headlines



Gay Issues Enter the World of Philanthropy



Gays want Nonprofits to Show Their Inclusiveness



Preparing for the LGBT Transfer of Wealth

Volunteering and Giving More Than Heterosexual Counterparts

	LGBT	US Average
Annual philanthropic contributions	\$1,194	\$1,017
Percentage of income	2.5%	2.2%
Volunteer hours	29	18

Not Just Single-Issue Donors

“Anyone who thinks that lesbians and gay men only support LGBT or HIV/AIDS causes better think again. **They support all types of causes.**”

The Nonprofit Times, April 2016

Source: “[Creating communities: giving and volunteering by gay, lesbian, bisexual, and transgender people](#),” Working Group on Funding Lesbian & Gay Issues and Institute for Gay & Lesbian Strategic Studies, New York and Amherst, 1998; Drezner, N. “[Emerging Data on How Gays Give](#),” *The Chronicle of Philanthropy*, August 2013; Advancement Forum interviews and analysis.

Seeing Dollars and Participation Today

Debunking the 'All or Nothing' Belief

Fortunately, there are steps institutions can take right now for just one or two of these diverse segments that do not require a substantial investment or a complete overhaul of fundraising structures. Investments in female alumni engagement through the formation of a giving circle, for example, drives participation and dollars today while building a long term talent pipeline for board membership. Enfranchising alumni of color to make peer-to-peer asks encourages increased engagement, provides meaningful feedback on diverse student experiences, and builds a pipeline for major gifts. Equally, LGBT efforts and celebrations that connect LGBT alumni with current LGBT students help drive participation and giving today.



Women Alumni



Alumni of Color



LGBT Alumni

Dollars and Participation Today

Example:
Young alumnae giving circles increases **participation rates**

Example:
Engage alumni of color through **peer-to-peer solicitations**

Example:
Connect LGBT alumni with LGBT students to **increase participation**

Pipeline Dollars for Tomorrow's Campaign

Leadership giving component cultivates high-capacity donors

Enfranchise older alumni of color through **leadership opportunities** and celebration programs

Sustained commitment to LGBT causes encourages **larger giving trends**



Women Alumni

SECTION

3

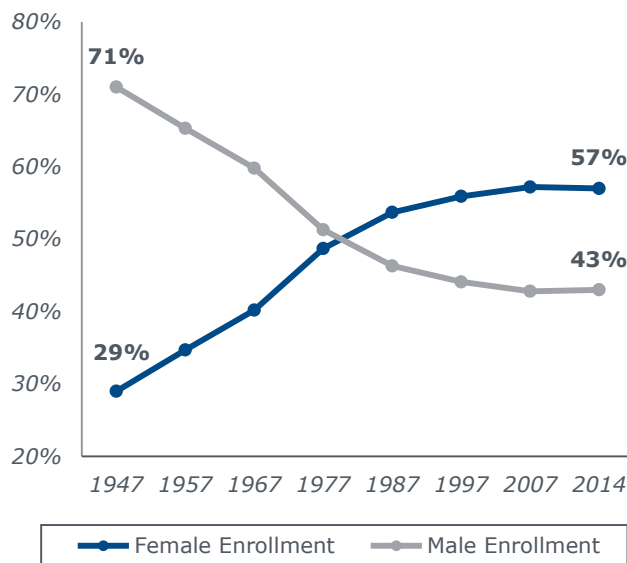
A Troubling Trend in Higher Education

Enrollment Versus Giving Trends Among Female Alumni

The growing economic might of women is a good thing for colleges and universities where women increasingly comprise the majority of undergraduates on campus. Historically, many institutions had more male students than female students, though that has changed. In the last 60 years, there has been a substantial shift in enrollment trends by sex. Women now comprise the majority of first-time students on campus and are enrolling in graduate and professional schools at historic rates.

College Enrollment Trends

Percentage of First-Time Students by Gender



Where Are the Women?

“Our enrollment statistics showed that we were moving towards a majority of women on campus, but our giving statistics showed that most of our donors, at all levels, were men. That was a troubling trend to us.”

*Associate Vice President for Development
Master's Institution*

\$8K vs. \$19K

The average lifetime giving for alumnae of **Duke University** was about \$8,000, while men gave \$19,000

While the majority of students on campus and, increasingly, alumni, are women, giving by this growing population is often less than that of their male counterparts. The common refrain heard during research conversations was “where are the women?” In a comprehensive analysis of lifetime giving, Duke University noted that their female giving averages fell more than \$10,000 below their male giving average. Focusing on increased female giving at the \$25,000 to \$1,000,000 level, Duke projected \$48 million in new gifts if alumnae giving rates could be raised to equal those for men. As a result, the University launched the Duke Women’s Impact Network Leadership Council to strengthen its alumnae engagement efforts and deepen their philanthropic work with alumnae and has begun to see traction in this space.

Source: O’Neil, M., “Women Primed to Give Big,” *The Chronicle of Philanthropy* June 1, 2016; IPEDS, *National Center for Education Statistics*; Advancement Forum interviews and analysis.

Pastel Invites, Lunches, and Finance 101

A Programming Legacy of the 1980s and 1990s

Seeking to engage this growing constituency, many institutions have launched and support loose affiliation networks for their female alumni. While this engagement is a step in the right direction, many of these networks launched in the 1980's and 1990's and do not resonate with female alumni and donors of today. Most of these programs aim at bringing together high net-worth alumnae for social events paired with some educational programming (e.g., finance workshop).

Status Quo Women and Philanthropy Programs



Common Challenges and Barriers

- ✘ Time consuming for staff to organize
- ✘ Questionable return on investment
- ✘ Agendas not focused on institution specific updates and causes
- ✘ **Not resonating with alumnae**



"I own my own business. I don't need a financial education workshop."

"I am a lawyer with skills as well as community connections but they didn't seem to be interested in that."

"The university never asked me for anything. However, I did become a donor to the local non-profit that presented. It is a great cause."

While these programs resonate with small segments of alumnae, they have seen limited success. Further, existing programs are time consuming, see declining participation rates, aren't focused on institutional causes, and most importantly simply do not resonate broadly with alumnae.

Wealthy and influential female donors do not need or want a finance 101 workshop. This isn't the type of engagement and connection high powered and wealthy alumnae want with their alma mater. Female donors at all levels seek a deeper level of involvement in an organization or cause and have a special affinity for communal philanthropy. Colleges and universities need to respond to those desires in innovative ways.

Women of All Ages Want Greater Connections

This Trend Unlikely to Change in the Near Future

The Women's Institute at The Lilly School of Philanthropy highlights that female donors want greater involvement with organizations they support, meaningful leadership opportunities, qualified objective information, and peer-to-peer connections. Given the desire for increased engagement paired with the reality that 64% of all charitable gifts are made by women, colleges and universities can't afford to ignore their preferences.

What Women Donors Want

- Encourage greater involvement with organization
- Impact stories with results data
- Facilitate peer-to-peer relationships
- Leadership and networking opportunities
- Long-term thinking
- Research and investigation
- Increased connection with charity

Donating to Alma Mater Isn't a Priority for Millennial Alumnae

77%

Of female millennial alumni have given to their favorite **non-profit** cause

44%

Of female millennial alumni have given to their **alma mater (56% of male millennial alumni have donated to alma mater)**

Of Course They Aren't Giving, We're Asking Them to Lunch!

"Millennials want to give their time, skills, and dollars. They also want to see their impact....they are willing to work hard, but they want to be hands on. We need to do more than ask them to lunch."

*Assistant Vice President, Alumni Relations
Master's College*

One of the greatest challenges and an area of opportunity for colleges and universities is millennial alumnae engagement. Millennials have signaled that they want to do more than simply write a check; They want to give their time and skills, in addition to their dollars. The Millennial Impact report found that 77% of millennial alumnae have given to their favorite non-profit cause, however only 44% of millennial alumnae have given to their alma mater. This suggests that colleges need to revamp their engagement strategy, especially with younger women, as their current practices are not working. Millennial alumnae are giving, just not to their alma mater.

Source: Bowman, M., "Mind the Gender Gap – Women's role in philanthropy – A Canadian Perspective," *Fundraising Compass*, 11 August, 2015.; Stiffman, E. "What Women Donors Want," *The Chronicle of Philanthropy* 7 October 2015; "Millennial Alumni Report," *Achieve Guidance Research*, 2014, p 15; Feldman, D., *Millennial Impact Report*, *Achieve Research*, 2015; Advancement Forum interviews and analysis.

Rethinking Alumnae Philanthropy

Designing a Culture Shift

The College of William and Mary has begun to rethink alumnae philanthropy and engagement. As part of this work, they created a full-time position dedicated to alumnae engagement that dual reports to advancement and the provost's office. The initiative is more than just a single person's responsibility; they created a university-wide committee with faculty and staff to boost engagement opportunities within academic departments. Additionally, they convened a group of high-level women donors to provide input and strategic direction on engagement efforts across the university.

Alumnae Engagement and Philanthropy

“It is imperative that we first engage women meaningfully in the life of the university. From there we can develop a strong pipeline of women leaders so that we ultimately see great increases in philanthropy. Our mantra is grow engagement, grow leadership, grow philanthropy.”

*Matthew T. Lambert
Vice President for University Advancement
The College of William and Mary*

Alumnae Engagement Initiatives FTE



- Full-time staff position focused on alumnae programming, volunteer, and engagement opportunities
- Dual reports to advancement and provost's office to enhance cross-campus collaboration



Faculty and Staff Advisory Group



- 35 members charged with creating alumnae engagement that benefits academic departments and students
- Assist in growing relationships with alumnae volunteers and leaders



Women & Philanthropy Leadership Circle



- High-level women donors convened to provide input and feedback on engagement efforts
- Exploring models to grow alumnae giving to at least the same level as male graduates



Please see the associated tool, *Launching a Giving Circle Strategy Guide*, in the toolkit at the back of this book on page 61.

Source: O'Neil, M., "Women Primed to Give Big," *The Chronicle of Philanthropy* June 1, 2016; Advancement Forum interviews and analysis.

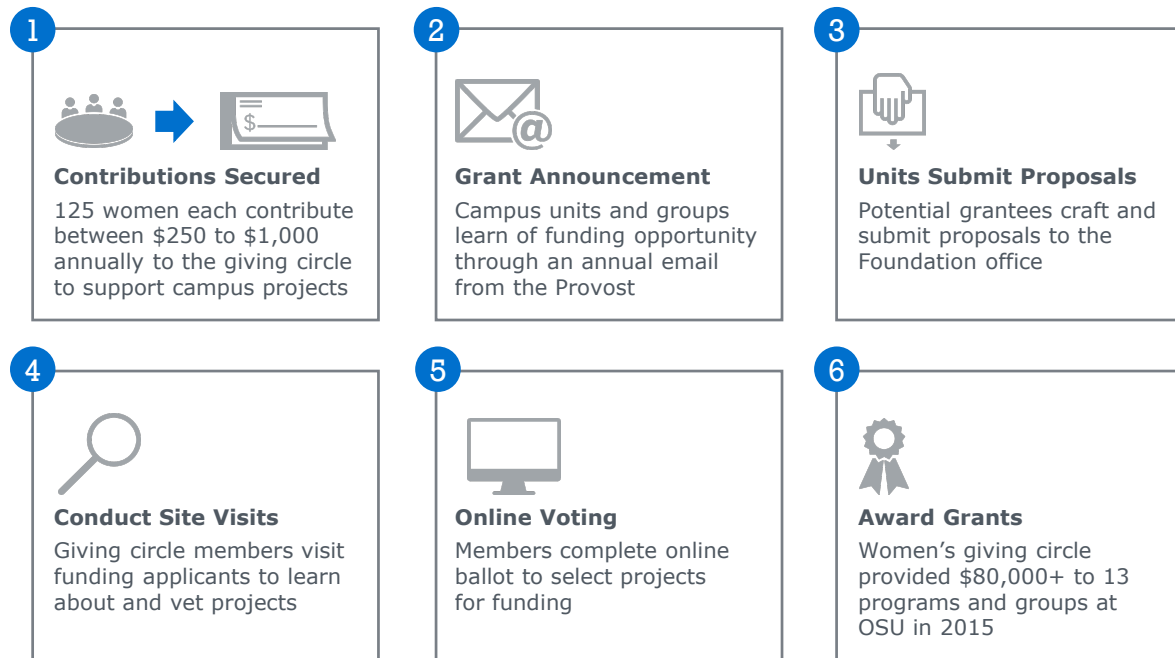
Learn, Connect, Participate, and Support

A Giving Circle Engages Alumnae with Campus Partners

One way to operationalize women's engagement and giving is through a dedicated giving circle. A giving circle is a form of active philanthropy where a group of individuals, usually sharing a common interest or expression (e.g., sexual identity, gender, race) commit dollar amounts to a shared pool of money. That money is then given to a single charity or initiative that seeks to support a self-identified priority of the giving circle. The circle members then elect through a democratic process what causes or projects will receive the funds. Giving circles are not only a vehicle for giving, but are a way to encourage participatory and active philanthropy.

Oregon State University's (OSU) women's giving circle is unique featuring tiered membership levels which increases accessibility to millennial women. The circle also provides a chance to connect alumni with the institution via digital channels, building in web-based voting to their circle combating geographical challenges.

Key Elements of Oregon State University's Women's Giving Circle



Each year giving circle members at OSU contribute between \$250 and \$1,000 each to support University projects. Academic and other campus units submit proposals for circle members to vet. Circle members then conduct site visits as part of the review process, highlighting the connection to the institution as a component of membership. Then, members vote online to select winning projects. The online voting component makes OSU's circle stand out because members don't have to live nearby to vote. The circle then funds the projects that receive the most votes from circle members.

Source: Advancement Forum interviews and analysis.

Hands-On Involvement and Direct Impact

A Win-Win for Circle Members and Advancement

In 2105, the giving circle at the Oregon State University Foundation awarded more the \$80,000 to 13 initiatives across campus. The circle funds projects that are both of interest to female alumni and students (e.g., a women in physics conference) and projects that are not as female-specific (e.g., stipends to facilitate active learning in large lecture courses). Oregon State University has noted that the giving circle is a way to onboard female donors to increased philanthropic involvement with the Foundation and engages them with the institution in more meaningful and targeted ways. Giving circles are also an interactive way to engage and cultivate board talent.

Sample Funded Projects by OSU's Women's Giving Circle

\$10,000

Sexual Violence Prevention Workshop Series to support university efforts to combat sexual assault on campus

\$2,500

Women in Physics Conference held on campus in January 2016 bringing together young women scientists

\$9,800

Stipends for learning assistant program, which facilitates active learning in large lecture courses in the College of Science

Key Logistics:

- Circle members have contributed over \$700,000 to OSU projects since 2003
- \$250–\$1,000 annual contributions required for circle membership
- One staff member from Annual Giving supports the circle as well as a 12 person steering committee
- Annual "Bring a Friend" campaign encourages circle growth

A Gateway for Philanthropy

“What we have seen is that the giving circle is a gateway for women to become involved in philanthropy. Some of them are already very philanthropic, but for some this has been a great way to onboard them to giving at OSU.”

*Kellie Parker
Senior Associate Director of Annual Giving
Oregon State University Foundation*

A Diversity of Giving Circle Options

Many Ways to Build Connections to the Institution and Other Women

Institutions that sponsor women’s giving circles help build personal, professional, and philanthropic connections not only among women but also between women and the institution. An added benefit is that giving circles often make individuals more strategic and educated givers and increase their overall giving.

Many colleges and universities are increasingly deploying giving circles as a tool to engage alumni. While many institutions have provided unique models for giving circles the institutional needs and desires for giving circles can be varied as evidenced by the three examples shown here.



Builds In a Mentorship Component

- ✔ Includes opportunity for circle members to serve as career mentors to scholarship recipients
- ✔ Circle members also participate in leadership training, cultural activities, and networking initiatives
- ✔ Five-year post-scholarship “re-seed” requirement instills a culture of philanthropy in student recipients

Expands Philanthropic Networks

- ✔ 50/50 split of giving circle funds between college projects and local community nonprofits
- ✔ Participants vote to support projects after site visits and informal debriefs
- ✔ Deepens circle members engagement with each other and community networks

Advises on Alumnae Engagement Strategy

- ✔ Members give advice on strategies for increasing alumnae engagement
- ✔ Enhances networks among current alumnae and gives them a space to engage with each other
- ✔ Creates a structure for recruiting the next generation of alumnae volunteer leaders

Source: Advancement Forum interviews and analysis.

‘Dynamic Women Making a Powerful Impact’

A Shift in Focus

As we think about increasing alumnae giving and engagement, one long-term challenge that continues to stand out concerns women in leadership roles. All too often, women are under represented on university boards of trustees, regional boards, and campaign committees. This problem is not unique to higher education or non-profit leadership; in the business world women occupy just 16.9% of Fortune 500 corporate board seats. One common barrier to expanding the number of women on boards and high profile roles uncovered through EAB research was the thinking that institutions don’t have a pipeline for alumnae leaders; UCLA’s *Women and Philanthropy (W&P)* program helps combat those perceived challenges.

women & philanthropy

UCLA

Women & Philanthropy (1994)

- Established with the **goal of raising several hundred dollars** from women for the university
- Used “**opt-in**” **model** where donors had to join to access the programming and benefits
- **Founded by 15 members** who each gave a gift or pledge of \$25,000 for five year membership
- The group grew to **140** members

Revamped Program (2014)

- Changed to **recognition model** so all women who give at the qualifying levels are automatically welcomed into the network
- Added **new membership tiers** including University Leadership and Lifetime, for those whose giving to campus reaches \$250,000 to broaden opportunities for mentoring and engagement
- Revitalized effort to identify **leadership opportunities** for women at the university including boards and committees

1,870

Total members in W&P network in 2016

365

Positions held by W&P members on university boards and committees

\$611M

Total given by W&P members to UCLA since 1994

UCLA established a women and philanthropy group in 1994. In 2014, under the leadership of a new director, UCLA revamped the program making significant changes. First, they overhauled the marketing and branding of the program to highlight leadership and networking opportunities, using the slogan “Dynamic Women Making a Powerful Impact.” Second, they added new membership tiers including one for faculty and administrators as well as one for younger alumni. Finally, they invested staff time to proactively connect women with volunteer opportunities and roles on campus that matched their skills and interests. The program helps build and grow a pipeline of talented female leaders for philanthropic and other campus volunteer opportunities.

Source: Advancement Forum interviews and analysis.

Women Alumni: The Path Forward

Reflection Questions and Next Steps

Institutions interested in strengthening their strategies for engaging women should use the reflection questions provided to guide on campus brainstorming sessions with advancement and alumni relations staff after reviewing the aforementioned material. Advancement leaders should then consider possible next steps and areas of investment related to alumnae engagement and giving.



Reflection Questions

- What does our institution's giving look like for alumnae as compared to the overall trends?
- Are our millennial alumnae giving at lesser rates than their male peers?
- What programming and initiatives do we currently offer for alumnae?
- How many of our senior volunteer leadership roles are currently held by women?



Potential Next Steps

- Explore whether alumnae would be interested in a giving circle
- Assess whether it makes sense to invest in dedicated programming for alumnae and/or a FTE to work with this segment
- Enhance the number of women on boards and committees through dedicated recruitment initiatives



Alumni of Color

SECTION

4

Diverse Alumni, Different Barriers to Giving

One-Size-Fits-All Asks Do Not Resonate

Alumni of color are a growing proportion of the alumni base. They have capacity and are philanthropic. However, institutions report lower giving and participation rates from this constituency and alumni of color often cite that nobody is asking them to give as a reason for their non-giving. Recognizing that institutions solicit every alumni that they maintain records for, the challenge for advancement officers is to understand why institutional asks are not resonating with their alumni of color.

I Am Asking!

"Alumni of color keep saying that we are not asking them. **I am asking everyone I have a record for.** Since their giving levels are below other groups, it must be that our asks don't resonate or they have competing interests. Likely a combination of both."

*Vice President for Advancement
Master's College*

Challenges in Engaging Alumni of Color



"We don't have the talent to make the ask"



"I don't have good data"



"I keep hearing we aren't asking them"



"They don't give to higher ed"



"They have too many competing interests"



"I can't develop an ask that resonates"

Projections U.S. Population Demographics

18%

Percent of the US population that will be **black** by the year 2060

12%

Percent of the US population that will be **Asian** by the year 2060

28%

Percent of the US population that will be **Hispanic** by the year 2060

High Growth Student Populations, 1980-2014

240%

Growth in black enrollments at US colleges and universities

375%

Growth in Asian/Pacific-Islander enrollment at US colleges and universities

285%

Growth in Hispanic enrollment at US colleges and universities

Source: Colby, S., "Projections of the Size and Composition of the U.S. Population: 2014 to 2060," US Census Bureau, March 2015; IPEDS, National Center for Education Statistics; Advancement Forum interviews and analysis.

Thinking Differently About What We Do

Recalibrating Strategies for Alumni of Color

Higher education advancement leaders need to recalibrate their approach if they want to do a better job connecting with alumni of color. In order to assess, measure, and reconfigure these approaches, there are three questions advancement leaderships must explore to further engage alumni of color:

- What asks resonate with diverse donors?
- Who should be making the ask?
- How can advancement offices enfranchise alumni of color to take the lead in their philanthropy?

The following pages provide actionable examples that answer these questions.



Three Options for Tailoring Solicitations

1

"What asks resonate with diverse donors?"



Fundraising Products
EAB Strategy

2

"Who should be making the ask to diverse alumni?"



Peer-to-Peer Asks
Williams College

3

"How do I enfranchise alumni to take the lead?"



First Black Graduates Project
University of Miami

‘Don’t Assume We Know Best’

Let Alumni of Color Inform and Shape Advancement Efforts

In order to create asks that will resonate with diverse donors, advancement staff must acknowledge, listen, recognize, and understand the experiences and priorities of their alumni of color. To accomplish this, institutions can make investments as straightforward as rebranding engagement surveys to include demographic-related questions to hosting a series of student alumni listening tours for diverse alumni.

Creating Channels for Alumni Feedback



Community Roundtables

Engage diverse alumni groups through targeted listening tours to gain honest and open feedback and inform strategy



Diverse Alumni Attitudes Survey

Reframe traditional engagement surveys to capture segment specific priorities and issues



Student Group Listening Tours

Representatives from Alumni Affairs attend diverse student organizations’ monthly chapter meetings



Design Thinking Labs

Diverse alumni explore with a professor their experiences on campus, career accomplishments, and how Georgetown impacted their trajectory



Please see the associated tool, Alumni of Color Listening Tour Worksheet, in the toolkit at the back of this book on page 59.

From Misaligned Asks to Appeals That Resonate

Understanding Diverse Donor Interests

However, simply gathering feedback from alumni of color is not enough. Institutions must use the data and insights to make informed investments in alumni of color engagement programs and gift solicitations. The information gathered through roundtables and surveys can be helpful in thinking about the types of asks that might resonate with alumni of color. Many of the institutions already investing in this space report that alumni of color often want to help make the campus a better experience for current students and pay it forward.

A Status Quo Ask

Dear Melanie,

We hope that *Hazel University* had an impact on your life and career goals. **In an effort to continue to provide high-quality education to all students, please support our endowment fund.** We continue to rely on the support of our alumni to “fund it forward.”



Specific Fundraising Products For:

Asian-American Alumni

- \$500: Interview travel grants for Asian students
- \$1,000: Book stipends for female faculty members
- \$10,000: Diwali scholarship

Black Alumni

- \$500: Black scholar graduation cords
- \$1,000: Black student union programming
- \$10,000: Summer internship fund

Why the Status Quo Doesn't Work:

- Appeals to support endowment unlikely to resonate with diverse alumni
- Unclear how gift will impact current students from diverse backgrounds
- Doesn't acknowledge alumnus' experience may have been different than the majority

Fundraising products can be a potential solution to meeting the unique needs of alumni of color. Fundraising products are essentially a list of curated and well packaged priorities that donors can fund at a variety of price points. For alumni of color, institutions could craft products for a single group and then send out targeted appeals. Another approach would be to make a master catalog of options across populations and then market it to diverse individuals broadly, a holistic approach to diverse giving.



Please see the associated tool, *Diverse Fundraising Products Worksheet*, in the toolkit section at the back of this book on page 65.

Who Is Making the Fundraising Ask?

Strategically Leveraging Peer-to-Peer and Student Appeals

While fundraising products help institutions think more strategically about what they are soliciting their diverse alumni populations to give to, institutions also need to think about *who* is making the fundraising ask. Advancement officers must think about leveraging affinity champions from diverse alumni populations and/or current students to make the ask of their alumni peers to increase engagement and giving.

Peer-to-Peer Asks

Williams



Share with black alumni how their giving as an amount and percentage is less than overall average, seek their help in driving increases



500K Launch targeted campaign to support students funded by peer solicitations among black alumni



40% Alumni of color participation goal

Students Follow-Up with Personalized Video

UC San Diego



Student callers make annual giving solicitations



Student callers record themselves thanking the donor by name for their support; video file is emailed to donor



Time in seconds that each video takes to make on two iPads

Williams College noticed that their black alumni had significantly lower giving rates than overall alumni. After showing this data to their black alumni affinity champions they challenged them to help increase participation among their peers. The alumni-to-alumni peer asks were for dollars to support current black students on campus.

Another way to engage diverse alumni is to have student callers provide personalized 60 second video clips in follow-up to the donors. The customized nature of the video helps articulate the impact of the gift at all levels. Further, it provides a deeper connection to the institution than a simple thank you letter can accomplish, and it also helps make phonathon work more interactive for student callers.

Inviting Alumni of Color to Take the Lead

Partner with the Black Alumni Society to Identify Causes That Resonate

Another strategy to increase giving and engagement from alumni of color is to let them take the lead. To honor 50 years of desegregation, the University of Miami held a brunch and invited black alumni to attend. The Black Alumni Society enjoyed the event but thought they could do more to share their stories and give back to the University. As a result, the First Black Graduates Project was created which aims to identify, document, and recognize all black graduates from the 1960s and 1970s. The stated goal of this initiative is “to celebrate and chronicle this important part of our University history and raise scholarship dollars in honor of First Black Graduates to positively impact the lives of current University of Miami students and generations to come.”

University of Miami's "First Black Graduates" Project



Led by 12 member **steering committee** within black Alumni Society



Project aims to **identify, document, and recognize** all black graduates from 1960s and 1970s



Initiative culminates in a **weekend celebration** on campus to honor the university's first black graduates



Event designed to **celebrate history and showcase** how the university has improved the campus experience for current students



U Trailblazers Weekend Agenda (Abbreviated)

Schedule of Events

- Opening Program and Reception
- Campus Historical Tours
- Library Archives Exhibit
- Student-Alumni Forum
- Black Lives Matter Discussion
- First Graduates Display
- Faculty Meet and Greet Sessions
- U Trailblazers Gala

The project culminates at celebration weekend on campus. The weekend will include a gala fundraising dinner, an oral history project, campus historical tours, and discussions around race and university progress. The weekend is designed to celebrate the institution's history and showcase changes at the University that impact current students.

'Blazing the Trail and Building the Dream'

Celebrating Black Graduates and Asking Them to Support the Next Generation

University of Miami alumni feedback has been overwhelmingly positive. "Black alumni tell us...I am so glad you are doing this, here is my story, and how else can I help." The project includes multiple ways for alumni to get involved and give back including a memorabilia wall and a scholarship fund. Beyond attendance and dollars, the university plans to track growth in the black alumni society, number of alumni records updates with more accurate demographic data, as two performance indicators of the initiative's success. In addition, they are also considering tracking alumni file updates, social media impressions, and volunteer numbers.

“When they hear about the first graduates project, our black alumni tell us, 'I am so glad you are doing this, **here is my story, and how else can I help?**'”
Kate Lake, Senior Director of Alumni Engagement

Project Includes Multiple Ways for Alumni to Give Back



Memorabilia wall



Oral history project



Event sponsorships



Scholarship fund for current and future black students



Tangible Gift Impact Is Key

"We do plan to make giving part of this event. We will be making the ask in a big way. This is the most exciting piece as peer fundraising is going to be huge here...."

[When we are making the ask], we have to be very explicit on what we have done to improve the student experience for these populations. Alumni of color want to know what the impact of their gifts will be."

*Kate Lake
Senior Director of Alumni Engagement
University of Miami*

The Next Frontier in Talent Management

Increasing Diversity in Our Profession

To begin work with a more diverse donor base it will be increasingly important to think about the diversity of the advancement team. While increasing a diverse talent pipeline in institutional advancement is not the focus of this publication, it is important to highlight the calls to action in and around this notable challenge. Sue Cunningham, the President of the Council for the Advancement and Support of Education (CASE), highlighted the need to create diverse organizations a key benchmark of success for higher education in a letter to the editor of the *Chronicle of Philanthropy*.

A Limited Pool of Diverse Talent

THE CHRONICLE OF
PHILANTHROPY

*Philanthropic Leadership
Shouldn't Still Look Like the
Country-Club Set*

9%

Percentage of staff who work at educational institutions in advancement who are diverse

21%

Percentage of CASE survey respondents who indicated they had no diverse talent working at their institution in advancement

”

For Moral and Financial Reasons, Fundraisers Need to Be More Diverse

“...Beyond dollars raised, increased alumni engagement, and social media shared, we must make diversifying our organizations a critical benchmark of success. This may include reinforcing the organization’s commitment to diversity; enhancing and growing its current inclusion efforts; and identifying key performance indicators for evaluation. We are seeing increasing awareness of and commitment to this much needed transition among our member organizations.”

*Sue Cunningham, President
Council for the Advancement and Support of
Education (CASE)*

Source: Cunningham, S., “[For Moral and Financial Reasons, Fundraisers Need to Be More Diverse](#),” *The Chronicle of Philanthropy*, April 2016; AND Brown, K., “[State of the Work](#),” *Rockefeller Philanthropy Advisors*, 2015; Advancement Forum interviews and analysis.

Spotlighting Diverse Faces in Our Training

Update Scenarios for MGO Professional Development

Many chief advancement officers note that inclusiveness is a priority for their organization today. Even with that goal, becoming a more diverse profession is something that will take time and sustained effort. However, there are things that advancement offices can do today to update their gift officer training to reflect a more diverse alumni base that will not require significant time or money. Updating gift officer training modules to reflect a more diverse donor is one example.



Who are you soliciting?

Use diverse prospects in trainings for MGOs

Examples:

- 43 year-old female African-American business owner
- Asian-American couple, both alumni
- 60 year old Hispanic immigrant; mother of current student



What are you discussing?

Encourage MGOs to run towards difficult conversations

Examples:

- What was your experience at our institution?
- How can we improve that experience?
- Have we improved our diversity?
- What impact did our institution have on your career?



What are you asking for?

Require gift solicitations move beyond scholarships

Examples:

- Black Students in Business conference underwriter
- Indian cultural center lecture series
- Student diversity leadership summit

What We Can Do Now

“In the absence of a more diverse talent pool here and now, we can do a better job of training our MGOs to understand diverse environments and ultimately make them better fundraisers in the process.”

Assistant Vice President Development, Research University



Institutions should update scenario case studies for MGO interviews and trainings to ensure they include diverse constituencies. For example in role plays, institutions could have an MGO (a current employee or job candidate) go through making the ask to a 43-year-old female African American business owner. Key elements of that conversation might be understanding her experience at the institution and thinking about what might resonate with her, understanding how this might be different than a more traditional alumnus.



Please see the associated tool, Diverse MGO Training Scenarios, in the toolkit section at the back of this book on page 69.

Alumni of Color: The Path Forward

Reflection Questions and Next Steps

Institutions interested in strengthening their strategies for engaging alumni of color should use the reflection questions provided to guide on campus brainstorming sessions with advancement and alumni relations staff after reviewing the aforementioned material. Advancement leaders should then consider possible next steps and areas of investment related to alumni of color engagement and giving.



Reflection Questions

- What do our alumni participation rates look like for our alumni of color against other populations?
- Do our annual fund asks resonate with diverse donors?
- Based on our alumni demographics, which segment should we prioritize for engagement and giving?
- How diverse is our board of trustees? Does it look like our alumni base?



Potential Next Steps

- Conduct a listening tour for diverse alumni segments
- Audit campaign and marketing materials to assess representation of alumni of color
- Develop peer-to-peer alumni asks for diverse segments
- Invest in an affinity-focused FTE in development and/or alumni affairs



LGBT Alumni

SECTION

5

‘How Many of Our Alumni Are LGBT?’

Institutions Face Challenges in Sizing the Population

The most pressing short-term challenges with LGBT alumni is identifying and sizing the population. Advancement leaders face significant challenges around privacy concerns, survey fatigue, and underreporting. Alongside all of these challenges it is important to use correct terms in coding databases. Whether institutions are coding LGBT *identity*, or LGBT *activity*, or LGBT *affinity* are three very different and distinct measurements of the LGBT community. Further confounding the issue, there are multiple ways in which this alumni population self-identifies including gay alumni, lesbian alumni, bisexual alumni, queer, and transgender alumni.

Data Collection Pain Points



Privacy concerns



Under-reporting issues



Systematically updating LGBT data



Survey fatigue



Coding questions around LGBT identity vs. activity vs. affinity



Uncovering Rich Information

“We asked our alumni for comprehensive demographics for the first time. We were concerned that folks would think we were prying, but were pleased with the response rate. Over 10% of the respondents identified as LGBTQ. If we didn’t know that about our alumni population, it would be very difficult for us to meet their needs.”

*JC Schnabl
Assistant Vice Chancellor for Alumni Relations
University of Massachusetts Amherst*



Where Is the Data?

“Just how many LGBT Americans are there?...**It’s high time for the LGBT community to count and be counted.**”

*Time Magazine
June 2016*

While LGBT identity is often viewed as the most valuable piece of intelligence to capture, it is often the hardest to capture. Coding for LGBT identity means that institutions know definitively that a particular alumni is LGBT because the alumnus has informed the institution of such. Coding based on activity is less precise and often happens when an advancement office codes the fact that an alumni attended the LGBT alumni panel at alumni weekend. While it is likely that the alumnus in question is LGBT, it is hardly definitive. LGBT affinity is likely the easiest data point to capture and provides much of the same value. Coding for LGBT affinity is even more opaque and often occurs based on subjective understandings of alumni majors or on campus activities.

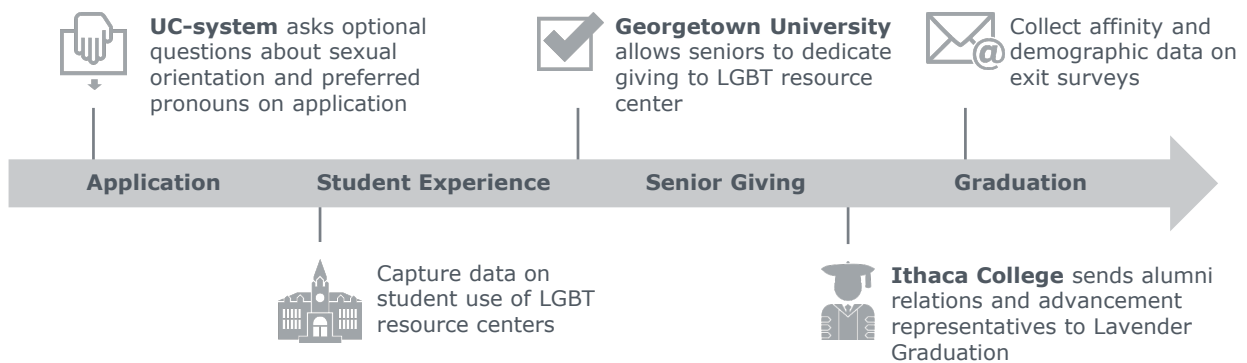


Please see the associated tool, LGBT Demographic Survey Best Practice, in the toolkit at the back of this book on page 75.

Starting Data Collection with Current Students

Multiple Opportunities for Intel Across Four Years

Advancement offices have multiple opportunities across the student lifecycle to capture relevant LGBT data while individuals are enrolled and on campus. In fact, some institutions are able to leverage data capture points that occur even before a student enrolls in college or university. The University of California system allows students to include information related to sexual orientation and preferred pronouns on their application form. Several colleges have been creating better channels to share information between the LGBT center and the advancement office, and Ithaca College even sends alumni and advancement staff to Lavender Graduation to connect with LGBT students as they celebrate commencement.



Many Touchpoints Across the Student Experience

“Whether we recognize it or not, there are so many touch points across the student experience when a student raises his or her hand and says ‘I’m gay’...we need to capture that information and use it more strategically after they graduate.”

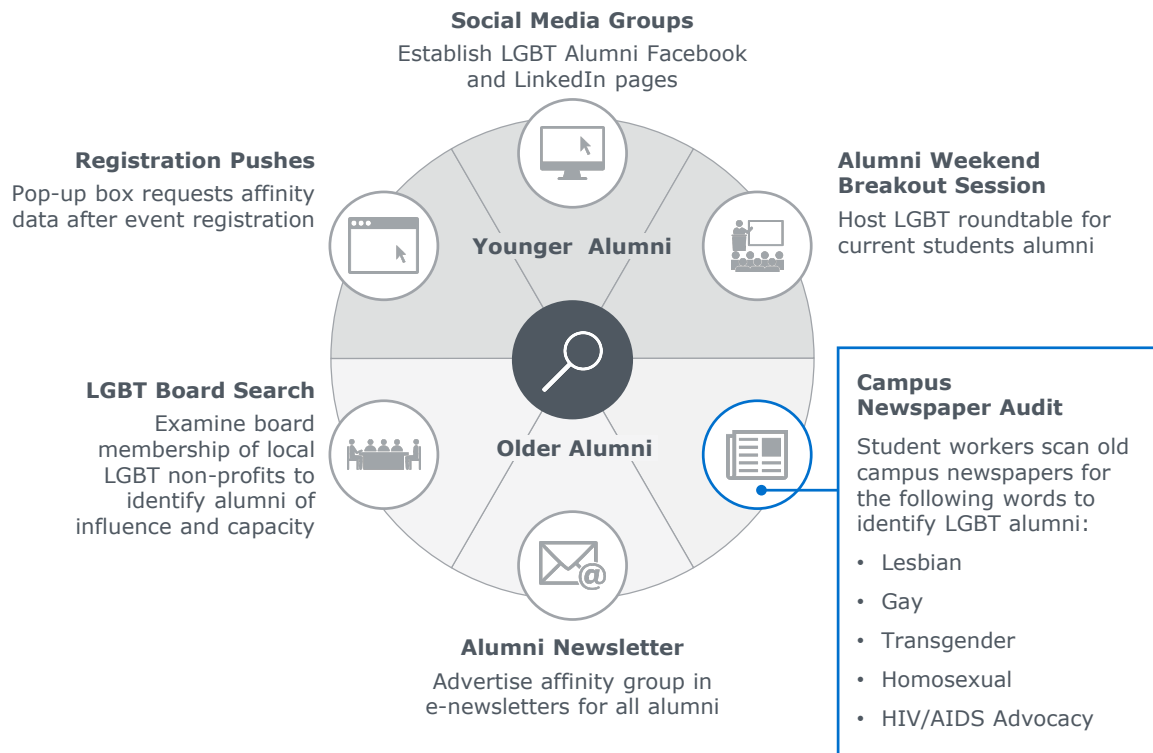
Vice President of Alumni Relations, Public Research University

These data capture points are only the first step. LGBT identity is fluid; how one identifies and describes themselves can change, especially among young adults who are in the main years of identity development. Universities need to recognize that students at the point of application or as enrolled students may often not fully understand their own sexual orientation. Institutions therefore need to create better channels for updating this information. Partnering with student affairs divisions not only provides advancement relevant and reliable data, but can also provide an added benefit of gift officer sensitivity trainings from LGBT center staff to development and alumni relations staff.

Leveraging Multiple Channels for Intelligence

Many Strategies to Capture LGBT Alumni Data

Updating alumni data for LGBT-related affinity can be challenging and the age of the individual can impact the channels and sources of this information. For younger alumni, institutions should spend time in the digital space leveraging social media and alumni weekend for additional affinity data. For older LGBT alumni, institutions need to do additional work. Scrubbing the local LGBT nonprofit board of directors against your alumni of record or by conducting an audit of student newspapers for key words such as “gay,” “lesbian,” “HIV/AIDS,” and “homosexual” helps source information that will help code LGBT alumni.



Please see the associated tool, Campus Newspaper Audit, in the toolkit at the back of this book on page 71.

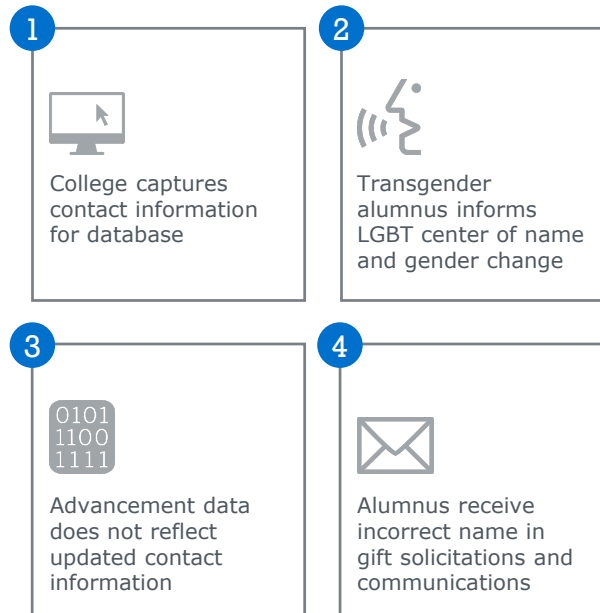
Source: Advancement Forum interviews and analysis.

Flexibility Is Key

Adapt Processes and Databases to Changing Identities

While data collection is key, it is also important that we update processes and systems to reflect changing identities. When a transgender individual transitions from the sex that he or she was at birth to better reflect their gender identity, it is important that university records and advancement offices update their systems accordingly. It is not only embarrassing, but can also be dangerous, to greet alumni by a name that is not their own.

Missed Opportunities in Data Maintenance



Hello, Griselda...Wait, I Mean Carl!

“Can you imagine getting an email that says ‘hello Griselda’ and you are like...no...‘I’m Carl.’” ...and “Who wants to be greeted by a name that is not theirs—especially for a solicitation for money?”

Luca Maurer, Director, Center for LGBT Education, Outreach & Services, Ithaca College

How Agile Is Your Database?

- Allow for preferred pronouns?
- Able to mail to “Mr. & Mr.” or “Ms. & Ms.”?
- Able to update an individuals’ sex or preferred gender?
- Able to use preferred name in communications?

From the Margins to Center Stage

Connecting LGBT Alumni with Current Students and the Institution

The on campus experience of LGBT alumni was different than the traditional majority alumnus experience, in the same way that the experience of female alumni or alumni of color was different from the majority alumnus experience. For example, many LGBT alumni from the 1980's often share the common experience that nobody knew they were gay, not even their roommates. As a result, several progressive institutions are making concerted efforts to celebrate and include LGBT alumni. Connecting LGBT alumni with current students is a great way to reconnect with them and engaged with the institution. Just as women want to be connected with each other and the institution, LGBT alumni want to be connected with each other and current LGBT students.



A Different Experience for Students Today

"I feel that for affinity groups, especially LGBT alumni, the opportunity to help students is the carrot. LGBT alumni from the 1980s often share the common experience that often nobody knew they were gay, not even their roommates; they would meet in the basement of a local church. **They often didn't feel welcome on campus and certainly felt marginalized...they don't want students today to have that same experience.**"

*LaurieAnn Russell
Director of Affinity Programs
Hamilton College*

Celebrating and Including LGBT Alumni



Alumni speakers at lavender graduation



Mentorship programs



LGBT student scholarships



Oral history projects



Feedback on current issues (i.e., gender-neutral bathrooms)

Let Your True Colors Shine

Driving Engagement, Participation, and Giving at Fresno State

As institutions engage with diverse constituencies and alumni groups, they also create new opportunities to make fundraising asks. In fall 2015, Fresno State Alumni Association launched a new alumni program for LGBT and ally champions in order to tackle tough questions like: “what does it mean to feel that you still belong to your alma mater? That you—and others like you feel accepted, respected and welcome?” The program is not atypical of other LGBT-related alumni affinity groups, but Fresno’s recent launch, early successes, and built in gift asks provide a case study to consider while investing in this space.

Launching an LGBT Alumni Group at Fresno State

- 1 Source Affinity Champions**
Identified local LGBT and ally alumni champions through alumni records, pride parade programs, and LGBT film festival memberships
- 2 Launch Program with On-Campus Mixer**
Hosted an on-campus mixer to launch affinity group and engage new alumni and ally participants
- 3 Make Ask in Follow-Up Outreach**
Asked participants to support the LGBT alumni group and related projects

Follow-Up Email



Thanks for Attending/We Missed You!

Nearly 65 alumni, allies, students, faculty, and staff attended the inaugural mixer hosted by the newly established Rainbow Alumni and Allies Club at Alumni House of Fresno State.

The goals of the club include engagement and connecting LGBT alumni and allies in a welcoming space, supporting campus advocacy and initiatives, **plus giving back to the Fresno State Alumni Association and Fresno State.**

Our hope is to positively fill the missing gaps for Fresno State where it is needed most.

The program launched with an on-campus mixer that included LGBT students, faculty, staff, alumni, and allies. In order to help identify possible guests the alumni association scrubbed the list of a local LGBT film festival sponsorship list for Fresno State alumni. After the campus event, the alumni association conducted follow-up outreach asking participants to financially support the LGBT alumni group and related projects.

Pilot Initiative Yields Promising Results

Fresno State Captures New Donors and Builds Pipeline

Fresno State's Alumni Association raised \$7,000 from 96 gifts in the first year of the pilot. More importantly, 65% of donors were first time donors to Fresno State. The funds are being used to support a variety of projects including rainbow tassels and medals for graduating students. Other potential projects for future asks include: a graduation recognition ceremony, rainbow prom, transgender awareness programming, and a housing emergency fund.

Fresno's Ask Yields Engagement and Dollars

1,000

Invitations sent to known LGBT alumni, allies, and campus partners

878

Facebook fans to Fresno State's LGBT alumni page within two months of launch

65%

Percent of donors were new donors to Fresno State

\$7K

Amount of money raised for LGBT initiatives on campus

Rewards of Targeted Engagement

"To date, we've raised nearly \$7,000 for special projects...We'll be able to capitalize on these first gifts in the future with additional opportunities that are LGBT related."

*Peter Robertson, Director of Development
Fresno State Alumni Association*

Potential Projects for Future Support



LGBT student programming



Mentorship programs



LGBT graduates recognition ceremony



Transgender awareness programming



Housing emergency fund

Sustained Progress, Not Just Lip Service

Cultivating LGBT Alumni Requires Commitment to Institutional Change

The long-term challenge for colleges and universities in working with LGBT alumni is showing sustained progress and a commitment to change. Institutions recognize that because of their diverse and different experiences at and with the institution, diverse alumni segments may require a little more effort to engage and effectively solicit them. Many institutions have made investments in this space, notable the inclusion of same-sex couples in alumni magazines and on promotional literature. The key to success in all of these segments is sustained commitment over time to highlight relevant change.



Source Champions from Out and Allied Alumni

“Out and Ally” List

Hamilton College publishes an annual listing of “Out” and “Allied” students, alumni, faculty, and staff; 1,072 names were on it in 2014



Highlight Institution’s Inclusivity

“Bruins Love” Highlights Same-Sex Couples

UCLA’s alumni magazine publishes a an annual section that highlights same-sex couples alongside heterosexual couples



Learn from Your Diverse Alumni Segments

Oral History Project

Projects engages alumni, gathers insights into campus experience, signaling the institution’s support, and provide valuable intel on prospects

Walking the Walk

“Diverse donors may need an extra couple years of cultivation and sometimes longer. Alma maters may need to prove to them that the way in which they were treated on campus for decades is not continuing and will not continue after the check is signed. By recognizing past wrongs, you can engage current donors and increase new donors. Get them in the pipeline.”

*Noah Drezner, PhD
Professor, Columbia University*

LGBT Alumni: The Path Forward

Reflection Questions and Next Steps

Institutions interested in strengthening their strategies for engaging LGBT alumni should use the reflection questions provided to guide on campus brainstorming sessions with advancement and alumni relations staff after reviewing the aforementioned material. Advancement leaders should then consider possible next steps and areas of investment related to LGBT alumni engagement and giving.



Reflection Questions

- What are we currently doing to engage and listen to our LGBT alumni?
- What campus programs can be leveraged to connect our LGBT alumni with LGBT students?
- How can we improve our data collection efforts with both students and alumni?
- Are there advancement database fields we need to consider updating to be more LGBT inclusive?



Potential Next Steps

- Enhance channels to source data from campus partners
- Explore potential solutions from database vendor around preferred pronouns
- Develop targeted LGBT fundraising products to increase participation
- Design a mentorship program connecting LGBT alumni with current students

Source: Advancement Forum interviews and analysis.



Toolkit

SECTION

6

- Diverse Alumni Listening Tour Worksheets
- Launching a Giving Circle Strategy Guide
- Diverse Fundraising Products Worksheet
- Diverse Alumni Survey Worksheets
- MGO Diverse Prospect Trainings
- Campus Newspaper Audit Worksheets
- Board Search Audit Worksheets
- LGBT Demographic Survey Best Practices

Alumnae Listening Tour/Focus Group Worksheet

Instructions

Equip your gift officers with the following worksheet when they are meeting with female alumni to better understand their experience at your institution and how they wish to direct their philanthropy. Alternatively, you could use this worksheet to guide a facilitated discussion with a focus group of female alumni.

Female Alumni Listening Tour/Focus Group Worksheet

1. Tell us about a high point experience during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide in helping women develop their leadership capabilities?

4. What can be done to encourage more women leaders in supporting ***Institution Name***?

5. Do you think that women are motivated to make charitable gifts differently than the men? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as a woman?

8. What other suggestions do you have about how ***Institution Name*** could increase financial support from women?

9. What do you think would inspire other alumni to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving?

Alumni of Color Listening Tour Worksheet

Instructions

Equip your gift officers with the following worksheet when they are meeting with alumni of color to better understand their experience at your institution and how they wish to direct their philanthropy. Alternatively, you could use this worksheet to guide a facilitated discussion with a focus group of alumni of color.

Alumni of Color Alumni Listening Tour/Focus Group Worksheet

1. Tell us about a high point experience during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide in helping students of color develop their leadership capabilities?

4. What can be done to encourage more alumni of color leaders in supporting ***Institution Name***?

5. Do you think that alumni of color are motivated to make charitable gifts differently? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as an alumni of color?

8. What other suggestions do you have about how ***Institution Name*** could increase financial support from alumni of color?

9. What do you think would inspire other alumni of color to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving? _____

LGBT Alumni Listening Tour/Focus Group Worksheet

Instructions

Equip your gift officers with the following worksheet when they are meeting with LGBT alumni to better understand their experience at your institution and how they wish to direct their philanthropy. Alternatively, you could use this worksheet to guide a facilitated discussion with a focus group of LGBT alumni.

LGBT Alumni Listening Tour/Focus Group Worksheet

1. Tell us about a high point experience during your time at ***Institution Name***. How did that influence your career or other life choices?

2. How did you develop your leadership skills?

3. What role should higher education provide in helping LGBT students develop their leadership capabilities?

4. What can be done to encourage more LGBT leaders in supporting ***Institution Name***?

5. Do you think that LGBT individuals are motivated to make charitable gifts differently than non-LGBT individuals? If so, how?

6. What was the catalyst for your most recent gift to ***Institution Name***?

7. What are some ways that ***Institution Name*** could do more to connect to you as a LGBT donor?

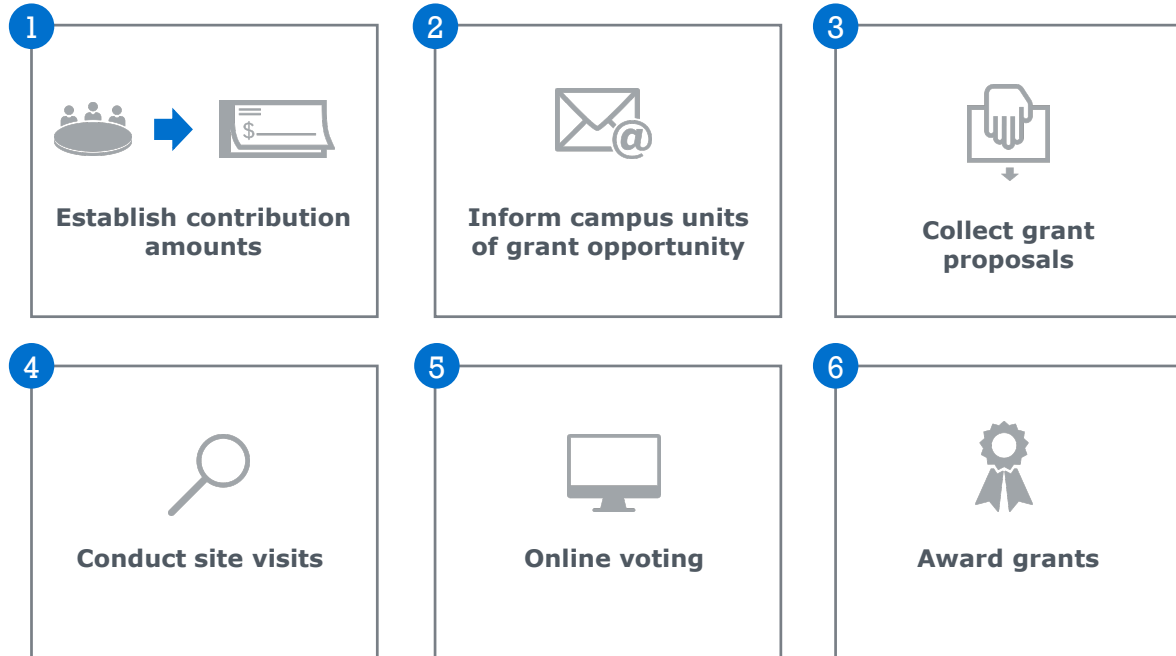
8. What other suggestions do you have about how ***Institution Name*** could increase financial support from LGBT alumni?

9. What do you think would inspire other alumni to financially support ***Institution Name***?

10. What do you hope to accomplish through your giving?

Launching a Giving Circle Strategy Guide

Key Elements of the Women's Giving Circle



Instructions

Many advancement units consider launching giving circles to engage diverse donors. Most institutionally sponsored giving circles focus on female alumni giving, but the giving circle model could also be used to engage LGBT alumni or alumni of color. Giving circles are used as a vehicle to encourage greater philanthropic engagement; they are often used *in addition to* traditional giving vehicles and designations rather than in replacement of.

Step One: Establish Contribution Amounts

Institutions can approach giving circle commitments in one of two ways:

Option A: A static price point for membership. All giving circle members contribute, at a minimum, a single established price point (e.g., \$1,000 per year).

Option B: Institutions create a graded scale for membership based on class year, employment status, income level, or other gradation. This option helps encourage younger individuals to participate in the giving circle and exposes them to senior philanthropic leaders, but may not initially net the same amount of philanthropic revenue.

Sample Membership Levels (For Option B):

- Lifetime Member (\$100,000 of lifetime giving)*
- Faculty Member (\$500 annual contribution)*
- Young Alumni Member (\$250 annual contribution)*
- Annual Member (\$1,000 annual contribution)*

Source: Advancement Forum interviews and analysis.

Launching a Giving Circle Strategy Guide (cont.)

Step Two: Engage Institutional Partners

Advancement offices should use giving circles as a strategic way which to engage other members of campus. One way to do this is through the sourcing of projects for funding consideration by the giving circle. In order to source institution-sponsored projects, advancement units need to seek proposals that are to be the recipient of giving circle funds. Campus units need to learn of the funding opportunity through email or a central grants funding portal. Engaging senior campus administrators (e.g., provost) elevates the position of the giving circle and will encourage stronger proposal submissions.

Possible Sources of Grant Announcement

- Email from Provost to faculty
- Inclusion in faculty newsletter
- Personalized invitations from Dean
- Correspondence from CAO
- Office of Grants announcement
- Invitation from Department Chair
- Faculty Senate announcement
- Word of mouth

Step Three: Create a Portal to Accept Unit Proposals

Oregon State University Foundation has established an online grant proposal portal to capture proposals from units across campus. The faculty and unit-facing online portal is a form that captures relevant information and sends it to the foundation office. A sample grant applications follows in the next page.

Requiring faculty to submit detailed budget requests, impact assessments, and program overviews ensures that the quality of grant application is strong. Advancement offices should:

1. Establish Grant Criteria: Criteria can include a requirement to enhance the student experience, improve student retention, and directly impact as many students as possible.
2. Acknowledge the average grant amount to manage recipient expectations.
3. Inform units of what projects are *not* eligible for funding (e.g., travel expenses, professor stipends).
4. Clearly define process and timelines (e.g., grant deadlines, site visits, voting, award announcement, awards celebration).
5. Provide advancement office contact details to address questions.

Launching a Giving Circle Strategy Guide (cont.)

Template From Giving Circle Grant Submission

Giving Circle Grant Application *(Web-based form submission)*

Personal Information

Name: _____ Job Title: _____

Email: _____ College Unit: _____ Phone Number: _____

Grant Information

1. Proposal Title: _____

2. Amount Requested: _____ Total Project Budget: _____

3. Provide a one paragraph summary of your proposal:

4. Provide a detailed budget, including all projected expenditures and sources of support. Indicate how funds from the Giving Circle would be spent (UPLOAD BUDGET).

5. Explain the proposed program, including its goals and objectives:

6. Why should the Women's Giving Circle fund this grant proposal?

7. Describe the impact of the program. How many students and/or community members will directly benefit? How many will indirectly benefit?

8. What are your projected outcomes and how will you measure the success of the project?

9. Describe the project's staffing:

Launching a Giving Circle Strategy Guide (cont.)

Step Four: Conduct Site Visits

Each year giving circle members should receive a packet of all completed grant proposals for vetting. Collectively they should visit the top four or five proposal sites, centers, and faculty members based on initial circle membership polling to learn more about each program. These visits help ensure that the giving circle members are connecting not only with each other but with the institution while evaluating the projects.

Questions Giving Circle Members Should Consider in Review Process:

- What difference or impact will the grant make for students?
- Is the proposal viable?
- What makes the proposal compelling?
- Is the grant amount appropriate? Should it be increased or decreased?

Step Five: Online Voting

After conducting site visits, the giving circle members need to vote on which grants they want to collectively fund each year. Voting can take place in person, via email, or via an online survey tool such as Survey Monkey or Survey Gizmo. EAB recommends to conduct voting via an online survey tool to adequately capture and also store responses and to combat challenges associated with requiring in-person voting (e.g., geographical restrictions).

Step Six: Grant Awards

Each year advancement offices should publish and celebrate the grant awards that were made by the giving circle. One way to accomplish this is through an institution-wide email announcement, another way is to host an awards luncheon.

Some of the winning awards at the **University of Oregon Foundation** across the last few years include:

Successful Grant Recipients

- Sexual Violence Prevention Workshop Series – \$10,000
- \$tart \$mart, Salary Negotiation for Women – \$4,650
- General Chemistry Supplemental Instruction – \$10,000
- Campus Visitor Center Tour Sound System – \$1,679
- Women in Physics Conference – \$2,500
- Textbook Cost Savings through Open Educational Resources – \$10,000
- Go Baby Go: Undergraduates Empowering Children with Disabilities – \$8,000
- Licensure Fees for Future Teacher – \$1,000
- Learning Assistants: Student Success for All – \$9,800
- Bridge the Gap: Alumni Mentors Guiding Students to the Workplace – \$4,557
- Women of Color Coalition Mentorship Program – \$8,154
- Music Education Instruments and Teaching Materials – \$7,012
- Student Learning in Mammalian Animal Anatomy – \$2,691

Source: Advancement Forum interviews and analysis.

Diverse Fundraising Products Worksheet

Instructions

Advancement offices should use this worksheet to identify units on campus that work with diverse student and alumni segments. Advancement units should then meet with program leaders to discuss their funding priorities and what resonates with diverse alumni at a variety of price points. Circulate the template on the following pages to the units identified below to gather information on where donors' dollars can have the greatest impact. Use the information to compile short brochures that gift officers can use in conversations with prospects that speak to the needs of diverse alumni.

Step One: Identify Campus Units

<input type="checkbox"/> LGBT Resource Center <input type="checkbox"/> LGBT Health Center <input type="checkbox"/> Women's Studies Program <input type="checkbox"/> Gender Studies Program <input type="checkbox"/> LGBT Student Group <input type="checkbox"/> Black Business Leaders of Tomorrow <input type="checkbox"/> Black Student Union <input type="checkbox"/> Other: _____	<input type="checkbox"/> Latino/a Studies Program <input type="checkbox"/> VP Student Affairs <input type="checkbox"/> Vice Provost for Diversity and Inclusion <input type="checkbox"/> Chief Diversity Officer <input type="checkbox"/> Asian Students Association <input type="checkbox"/> National Black Student Union <input type="checkbox"/> African American Cultural Center <input type="checkbox"/> Other: _____	<input type="checkbox"/> Black Men's Alliance <input type="checkbox"/> Destination Higher Education <input type="checkbox"/> Women's Center <input type="checkbox"/> Asian Cultural Center <input type="checkbox"/> Hispanic Cultural Center <input type="checkbox"/> Asian Studies Department <input type="checkbox"/> Hispanic Student Groups <input type="checkbox"/> Africana Studies Department <input type="checkbox"/> Other: _____
--	---	--

Campus Unit	Program Leader/Administrator	Contact Details
<i>Vice Provost for Diversity and Inclusion</i>	Dr. Melanie Bridges	bridges@university.edu

Diverse Fundraising Products Worksheet (cont.)

Step Two: Garner submissions from relevant campus units identified on the previous page and provide them instructions to complete based on funding requirements and wish lists.

Department Overview

This section will be used on the first page of the fundraising products brochure. Departmental leaders should describe the mission of their department and highlight particular strengths of their program. (100-150 words)

Impact Statement

This section summarizes for donors the impact that their gifts have on the department. Academic leaders should refer to the specific mission of the department and answer the question, "How will donors' gifts benefit students in ways that are unique from other departments?" (100-150 words)

Diverse Fundraising Products Worksheet (cont.)

Fundraising Product List

This section will allow donors to pick funding priorities that fit with their capacity and philanthropic interests. Each fundraising product should include a title, cost, and description of impact.

Title: _____

Cost: _____

Description (50–75 words): _____

Title: _____

Cost: _____

Description (50–75 words): _____

Title: _____

Cost: _____

Description (50–75 words): _____

Title: _____

Cost: _____

Description (50–75 words): _____

Title: _____

Cost: _____

Description (50–75 words): _____

Diverse Alumni Survey Request

Instructions

This worksheet was used by the **University of Miami** to capture relevant information about the first black graduates of the university. The information gathered was then used to curate and host an on-campus celebration of the first black graduates. More information on the project can be found at: <http://www6.miami.edu/alumni/groups/bas/first-black-graduates-project.html>

Encourage black graduates to fill out this form via email, paper, or web-based survey tools to gather relevant information in preparation for an event or to launch an oral history project.



Complete this form to share your story and ensure you receive information about the First Black Graduates Project:

Name: _____ UM Degree(s): _____ Year: _____

Phone: _____ E-mail Address: _____ Employer/Title: _____

Check the social networking sites you are on:

- Facebook Twitter
 LinkedIn Instagram

Please share your UM story and what ways you consider yourself a "First Black Graduate":

List student activities and/or organizations you were involved with as a UM student:

- I am willing to have my story/photos published in the **First Black Graduates** presentation
- I am willing to be contacted by a **committee member** or volunteer about my story
- I am willing to serve as a **social media ambassador**
- I am willing to serve as a **class ambassador** (i.e. class of 1970)
- I am willing to **volunteer** at the celebration (February 24-25, 2017)
- I am willing to serve as a Griot (Help collect **oral histories**)
- I would like to **recommend a classmate**: _____

Diverse MGO Training Scenarios

Instructions

This worksheet has been designed by EAB to help advancement leaders integrate diverse scenarios and personas into current gift officer trainings. The personas can be used to supplement existing gift officer training modules and can also be used in the recruitment process to assess gift officer candidate's ability to solicit and engage with diverse prospects.

One key to highlight in this exercise is that gift officers should not focus their gift asks on scholarships (e.g., African-American scholarships). Advancement leaders should encourage gift officers (or gift officer candidates) to think about other areas of philanthropic support.

Step One: Identify Prospect Personas to Use:

1

African-American Female Business Owner



- Attended institution immediately after desegregation
- Launched a women entrepreneurs club while on campus
- Has never given a gift before

2


Asian-American LGBT Alumni Couple



- Met while on campus
- Were international students at the time; one from China the other from Japan
- Recently naturalized US citizens

3


African-Caribbean Male Alumni Executive



- Recently divorced (former partner was also an alumni)
- Continued on to MBA program at prestigious New England school
- Two young children; joint custody
- Climbed corporate ladder

4

Hispanic Immigrant Grandparent of Current Student



- Recently arrived in United States with the support of son who was already based in south Florida
- Most of his family resides in Dominican Republic
- Earned wealth through trade agreements

Diverse MGO Training Scenarios (cont.)

Step Two: Connect Who You are Asking with the Questions

Possible Questions for Discussion

- What was your experience at our institution?
- How can we improve that experience?
- Have we improved our diversity?
- How do you think we can continue to improve our diversity?
- What impact did our institution have on your career?
- What was the experience like of other similar students on campus (e.g., Transgender, LGBT, African-American, Asian-American, women)?
- How does your philanthropy differ from the majority?
- What would you change about our institution?
- Where do we still need to make progress?



Possible Solicitations for Gifts

- Black Students in business conference underwriter
- Indian cultural series
- Student diversity leadership summit
- LGBT oral history project
- African-American oral history project
- Women in business conference underwriter
- Travel grant for diverse student job interviews
- Dress for success wardrobe
- Emergency housing fund for LGBT students
- Diversity in the academy transformational gift
- Asian-American oral history project
- Diwali Scholarship initiative for Indian students

Campus Newspaper Audit Worksheet

Instructions

Use this worksheet to assign a student worker in the advancement office a research-focused task to source information and research older LGBT alumni.

Step One:

Student workers identify location of historical campus newspapers. These locations are likely to include the university library, archives, newspaper office, website, and or a university records office.

Step Two:

Have the student worker read through and search the relevant articles for words related to LGBT and LGBT-advocacy. These words may include:

- Lesbian
- Gay
- Bisexual
- Transgender
- Queer
- Same-sex
- HIV/AIDS
- HIV/AIDS-Advocacy
- ACT UP
- Gender deviant

Step Three:

Students photocopy relevant newspaper clipping, highlight the relevant words and individuals on the photocopied paper.

Step Four:

Student works work to create a worksheet for each identified alumni. The worksheet will include all relevant information and press clipping from campus newspapers. The worksheet is then sent to the prospect research team for processing.

There is a sample worksheet on the next page for student worker use.

Campus Newspaper Audit Student Report Form

Instructions

Provide this worksheet to student workers tasked with conducting an audit of campus newspapers for LGBT alumni to send to prospect research.

Student Employee LGBT Alumni Referral Form

Student Worker Name: _____

Date Completed: _____

Alumni Name: _____

Degree(s) (if known): _____ Year of Graduation (if known): _____

Please identify in what publication you sourced the alumni noted above referenced in:

Please include a photocopy (if possible) of the relevant article with details highlighted)

Publication: _____

Year/Issue/Date: _____

Format: _____

Page Number: _____

What words or key phrases were used in the article to identify this alumni as possible LGBT (e.g., gay, lesbian, bisexual, transgender, HIV/AIDS, LGBT rights rally, LGBT protest, same-sex, Act UP, pansexual, queer, gender deviant):

Was this reference positive, negative, or neutral? (circle one)

Positive Negative Neutral Unsure

Was there any follow-up coverage based on this article?

Yes, if so where? _____ No

What other alumni were referenced in the article?

Is there an implied relationship between any of the named individuals?

Board Search Audit: How To

Instructions

This tool is designed to help source untapped LGBT alumni of both influence and capacity for your institution. Advancement officers should use it to source older LGBT alumni who they may have difficulty engaging with or coding as LGBT. The first part of this exercise aims to identify local, regional, and even national organizations that serve LGBT-related interests. The second part of this exercise involves scrubbing the organizations leadership and board membership against your alumni of record.

Step One

Complete the worksheet below to identify area non-profits that conduct work in LGBT-related fields. EAB has provided some examples in italics.

Organization	Focus Area	Headquarters
<i>Lambda Legal</i>	<i>LGBT Legal Services</i>	<i>Sample, USA</i>
<i>Ali Forni Center</i>	<i>LGBT Youth Homelessness</i>	<i>Sample, USA</i>
<i>Trevor Project</i>	<i>LGBT Suicide Prevention</i>	<i>Sample, USA</i>

Board Search Audit: How To (cont.)

Step Two

For each of the organizations listed on the previous page, institutions should conduct an audit or board and organizational leadership to source alumni prospects. While most of these individuals are likely LGBT, it is not guaranteed.

Board Alumni Audit for LGBT-related Board of Directors

Board Members	Alumni of Institution	If so, what year/degree?
1. <i>John Doe</i>	Yes No	1961, Biology and 1973, MBA
2.	Yes No	
3.	Yes No	
4.	Yes No	
5.	Yes No	
6.	Yes No	
7.	Yes No	
8.	Yes No	
9.	Yes No	
10.	Yes No	
Organization Leadership	Alumni of Institution	If so, what year/degree?
1. <i>Executive Director</i>	Yes No	
2.	Yes No	
3.	Yes No	
4.	Yes No	

LGBT Demographic Survey Best Practice

Instructions

Gender, gender identity, and sexual orientation can be sensitive, personal, and sometimes complicated data to capture. Institutions can use this worksheet to help ensure that they are as inclusive and comprehensive as possible when and if they seek data from students and alumni on these topics. These questions should always be optional and never required.

Because sexual orientation and gender identity are separate aspects of identity, institutions should never combine them into one question.

Suggested Best Practices for Asking Sexual Orientation and Gender-related Data

Suggested Wording

- This information is used for _____.
- Only (name of offices) will have access to this information.
- Your responses will be kept private and secure.
- The information will not be used for a discriminatory purpose.
- You can change this information in the future by _____.

Sexual Orientation (optional; choose all that apply):

- | | |
|--|--|
| <input type="checkbox"/> asexual | <input type="checkbox"/> queer |
| <input type="checkbox"/> bisexual | <input type="checkbox"/> questioning or unsure |
| <input type="checkbox"/> gay | <input type="checkbox"/> same-gender loving |
| <input type="checkbox"/> straight (heterosexual) | <input type="checkbox"/> an identity not listed: please specify
_____ |
| <input type="checkbox"/> lesbian | <input type="checkbox"/> prefer not to disclose |
| <input type="checkbox"/> pansexual | |

Gender identity (optional; choose all that apply):

- | | |
|--|--|
| <input type="checkbox"/> agender | <input type="checkbox"/> trans man |
| <input type="checkbox"/> androgyne | <input type="checkbox"/> trans woman |
| <input type="checkbox"/> demigender | <input type="checkbox"/> woman |
| <input type="checkbox"/> genderqueer or gender fluid | <input type="checkbox"/> additional gender category/identity:
please specify
_____ |
| <input type="checkbox"/> man | |
| <input type="checkbox"/> questioning or unsure | <input type="checkbox"/> prefer not to disclose |



Advisors to Our Work

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