



# Reorienting Toward the Top

Targeted Strategies for High-Value Parent Fundraising

# Advancement Forum

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# Supporting Members in Best Practice Implementation

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## Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in parent fundraising. Recognizing that ideas seldom speak for themselves, we aim 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/AdvancementForum](http://eab.com/AdvancementForum)), email your organization’s dedicated advisor, or email [research@eab.com](mailto:research@eab.com) with “Advancement Forum, ‘Reorienting Toward the Top’ Request” in the subject line.

### **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](http://eab.com).

### **Recorded and Private-Label Webconference Sessions**



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

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# Executive Summary

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Over the last decade colleges and universities have seen a proliferation of parent programming, and while many have made strides in engaging parents with targeted events and activities, the focus on engagement has meant limited investment in and gains from targeted fundraising efforts from this constituency. This event-heavy approach dominates resources that could be better deployed toward cultivating high-potential prospects.

For those institutions actually conducting fundraising in addition to their engagement efforts, most apply a mass solicitation approach to the acquisition of parent donors. And while first-year efforts from this type of appeal yield revenue, without a more segmented, high-touch approach, wealthy parent prospects focus their philanthropy elsewhere and often disappear by the time their students are poised to matriculate.

Colleges and universities who want to move toward a high-impact, fundraising-focused approach with parent prospects must begin by refocusing fundraising efforts on the top of the pyramid. Employing this focused strategy requires three steps. First, institutions have to identify, target, and acquire the right parents as early as possible. Second, institutions have to cultivate prospects using high-touch methods that make financial sense for the institution. And third, institutions need to capitalize on the senior year to secure a major gift and bring students into the philanthropic process to inspire young alumni giving.





# Refocusing Parent Fundraising

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ESSAY

# Nearing a Saturation Point

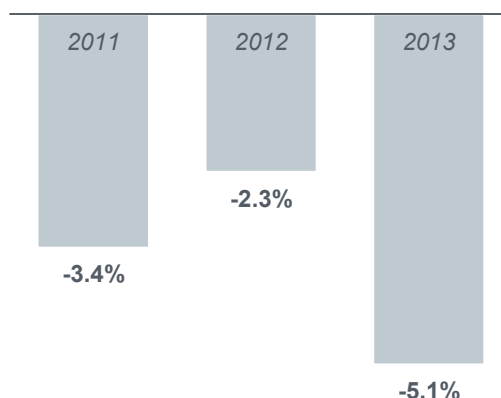
Alumni giving has long been the established core of college and universities' fundraising efforts. But, despite the fact that colleges and universities are graduating more alumni and using new ways to reach them, alumni participation rates continue to decrease. Even when advancement shops do acquire new alumni donors, their gifts are smaller than before. Moving the needle on alumni giving is tougher than ever.

While alumni will undoubtedly remain the biggest donor population, betting solely on this revenue stream leaves no room for error. Nonprofits with the best fundraising outlooks diversify their revenue sources. Failing to expand fundraising efforts beyond alumni places colleges and universities at a disadvantage in a time when presidents and provosts are looking to advancement to meet budget shortfalls with increased philanthropic revenues.

## Decreasing ROI in Alumni Giving Highlights Need for a Broader Base

### Median New Donor Revenue Change

Blackbaud



### Beyond the Usual Suspects

“Donations to charities are inching up so slowly that it could take at least five more years for most organizations to raise as much as they did in 2007. [Charities] forecasting the best outlook for 2013 and beyond are those making innovations in how they attract gifts and diversifying their sources of revenue.”

*Debra Blum and Holly Hall  
The Chronicle of Philanthropy*

Sources: Blackbaud, 2013 *donorCentrics Annual Report on Higher Education Alumni Giving* (2013), [https://www.blackbaud.com/files/resources/downloads/2014/04-14\\_TA\\_donorCentrics\\_HEAnnualReport\\_UPDATED.pdf](https://www.blackbaud.com/files/resources/downloads/2014/04-14_TA_donorCentrics_HEAnnualReport_UPDATED.pdf); Blum D, Hall H, “Donations Barely Rose Last Year as Individuals Held Back,” *The Chronicle of Philanthropy*, June 17, 2013, <http://philanthropy.com/article/Fundraisings-Recovery-Could/139801/>; EAB interviews and analysis.



# The Meteoric Rise of Parent Giving Programs

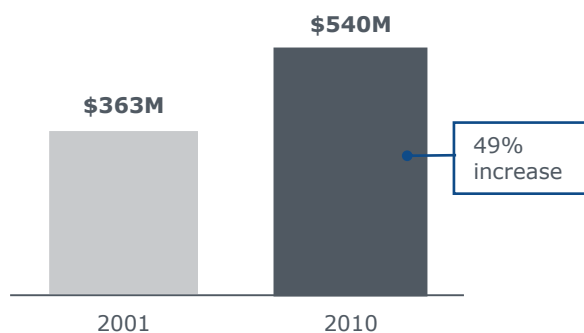
Higher education institutions are increasingly turning to a new market to diversify their donor revenue sources—parents. In the last decade, parent giving to higher education increased 49% and the percentage of parent programs that fundraise nearly doubled.

As advancement shops move into this space, questions about the parent philanthropy terrain emerge. For example, advancement leaders are wondering how to staff new parent programs, what stewardship initiatives to develop, and how to differentiate approaches between alumni parents and non-alumni parents. Organizations such as the Council for Advancement and Support of Education (CASE) have been racing to answer these questions. In fact, CASE saw a twofold increase in attendance at parent program conferences from 2009 to 2013.

## A New Source of Fundraising Revenue

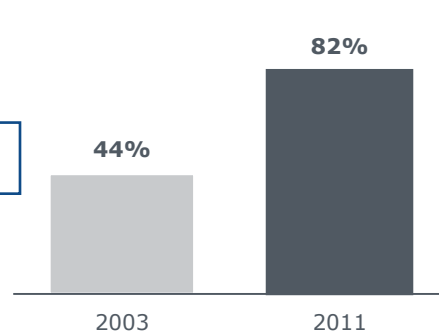
### Parent Giving to Higher Education

*Voluntary Support of Education Survey<sup>1</sup>*



### Percentage of Parent Programs that Fundraise

*National Survey of College and University Parent Programs*



### A Growing Landscape

**500+**

Institutions invest in parent programs

**59%**

Started their programs between 2001 and 2013

**50%**

Increase in attendance at CASE parent program conferences from 2009 to 2013

1) Figures are in actual dollars, not adjusted for inflation.

Sources: Savage M, National Survey of College and University Parent Programs 2011, University of Minnesota, <http://www.ahepp.org/assets/Parent-Program-Research/2011.pdf>; Council for Aid to Education, *Voluntary Support of Education Survey* (2010), <http://vse.cae.org>; Lydia Lum, *The Family and Friends Plan*, CASE, 2011, [http://www.case.org/Publications\\_and\\_Products/2011/NovemberDecember\\_2011/The\\_Family\\_and\\_Friends\\_Plan.html](http://www.case.org/Publications_and_Products/2011/NovemberDecember_2011/The_Family_and_Friends_Plan.html); EAB interviews and analysis.

# Grounding the Helicopter Parent

Parents perfectly fit the donor profile for several reasons. To start off, this generation of parents is particularly invested in their students' welfare. Parental hovering starts in pre-school and continues into college. Parents shorten the distance from home to college by communicating frequently with their students and peppering college administrators with inquiries about their students' educations. Some parents are even involved in their students' career development and job application process.

Progressive institutions take advantage of this seemingly pesky phenomenon and ground parents' interests in giving. Bringing parents into a donor role allows parents to get answers to questions, while also keeping them financially invested in the institution.

## Institutions Funnel Parent Enthusiasm Into Giving

### An Excess of Enthusiasm

**25%** Of young adults keep in touch with their parents several times per day

**17%** Of parents attended a career fair for or with their student

**31%** Of parents submitted a resume on behalf of their student

### From Hovering Parents to Donors

"Bringing parents close to your academic and philanthropic mission helps you deal strategically with helicopter parents. It's better to have them close and giving than having them on the outside poking in. Bringing them into a donor role can help us answer their questions while also keeping them invested in the institution."

*Evan Bohnen, AVP of Development  
Indiana University of Pennsylvania*

Sources: Collins L, "Helicopter Parenting Cramps Young-Adult Lives", *Desert News*, October 16, 2012, <http://www.deseretnews.com/article/765612119/Helicopter-parenting-cramps-young-adult-lives.html?pg=all>; Aleccia J, "Helping or Hovering? When 'Helicopter Parenting' Backfires", *NBC News*, May 26, 2013, <http://www.nbcnews.com/health/kids-health/helping-or-hovering-when-helicopter-parenting-backfires-f6C10079904>; EAB interviews and analysis.

# A Boon to Unrestricted Giving

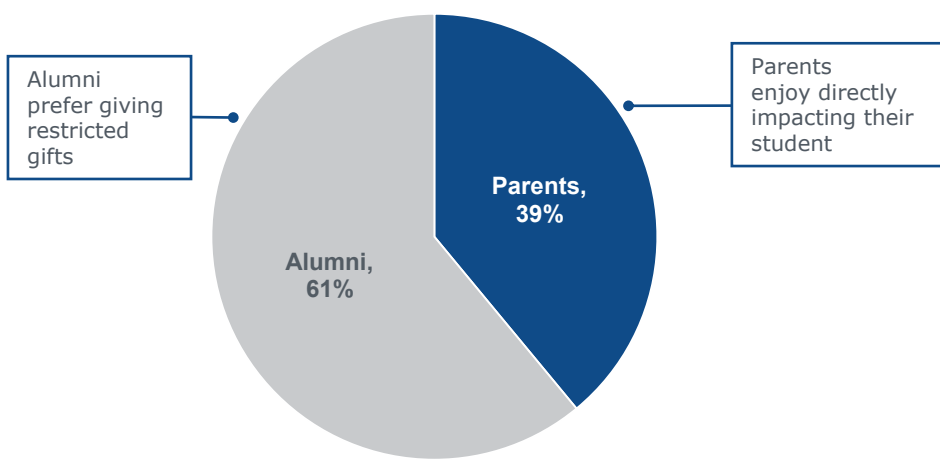
Parents fit the ideal donor profile for another reason. Given their strong interest in donating dollars that immediately impact their student, parents can help institutions fill their widening unrestricted giving gap.

Even though parents are a much smaller percentage of the overall donor population, they can make up a fifth, fourth, or even a third of the annual fund. This is particularly attractive to institutions with senior leaders who have made unrestricted giving an institutional goal.

## Parents Have a Vested Interest in Providing Current Use Dollars

### Percentage of Annual Fund Provided by Parents

*Public University, 2009<sup>1</sup>*



### The Icing on the Cake

“Unlike alumni annual gifts, parent annual gifts are largely unrestricted. This year, 75% of parent annual gifts were unrestricted. Parents like giving unrestricted gifts especially to the individual schools/colleges. And since deans are very dependent on annual fund dollars, they are very grateful to the parents’ fund. Although parent fundraising is the icing of the cake for the overall fundraising machine, we are very important in the annual fund.”

*Penny Chick, Director of Parent Programs  
Cornell University*

1) Anonymized contact university

Source: EAB interviews and analysis.

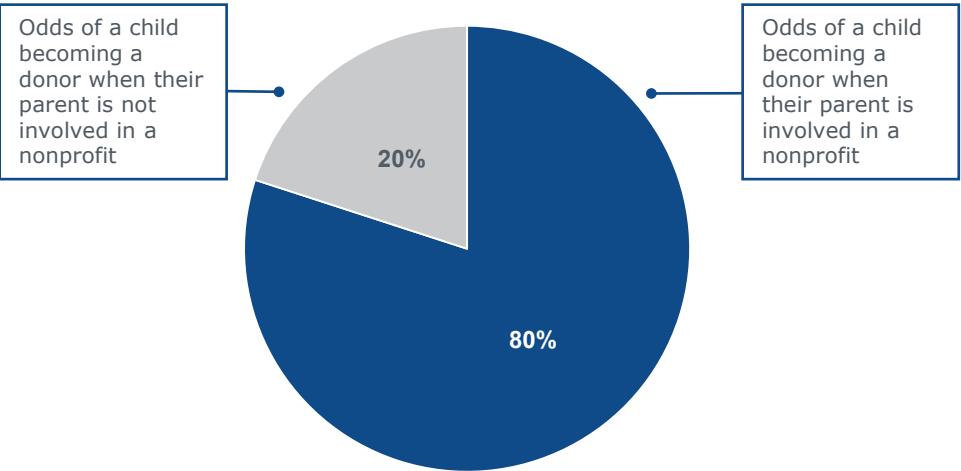
# Parents Influence Their Children

Perhaps even more important, parent giving is worth pursuing because it can have a long-term impact—contrary to its assumed label as a four-year transaction.

Research uncovers that parent giving has the potential to inspire young alumni giving, a group institutions often struggle to connect with. When one university conducted a focus group of their young alumni about what inspired their giving habits, they responded that they give because their parents gave.

## Young Alumni Donors Follow Their Parents’ Examples

### Parents Greatly Influence Their Children



### Generosity Across Generations

“We did a focus group with young alumni and asked the donors why they were donors. One by one, they said ‘Well, my parents give. They managed to pay \$50K a year in tuition and still support the university. How could I not?’”

*Senior Director of Parent Philanthropy, Private University*

Sources: The Agitator, *Heart of the Donor Executive Summary* (2010), [http://www.theagitator.net/wp-content/uploads/Russ-Reid-HOD\\_ExecSummary\\_Viewing.pdf](http://www.theagitator.net/wp-content/uploads/Russ-Reid-HOD_ExecSummary_Viewing.pdf); EAB interviews and analysis.

# The Perils of the Status Quo

As institutions realize the benefits of focusing on parents, many take an all-parent approach with the hope that casting a wide net will capture the few who could make a substantial impact.

Unfortunately, these institutions see abysmal response rates and even fewer dollars. The all-parent approach involving centralized annual fund staff, mass phone calls, emails, and direct mail outreach inhibits staff from identifying the handful of parents who can make five- to six-figure gifts.

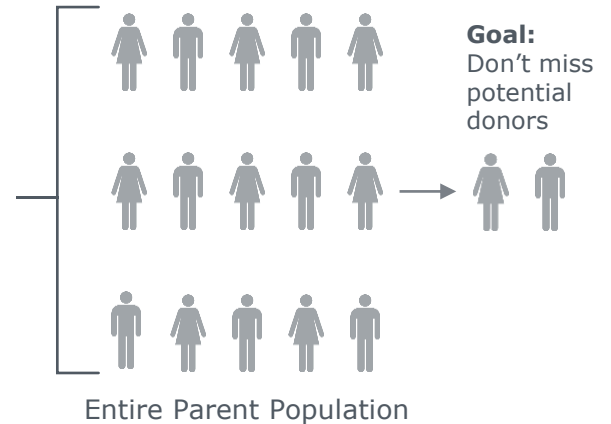
While a mass solicitation push in the first year may yield some revenue, its novelty quickly wears off if advancement staff do not refine their efforts. In the absence of high-touch cultivation, wealthy parents look to direct their philanthropy elsewhere.

## Quantity Over Quality Fails to Inspire Parent Giving

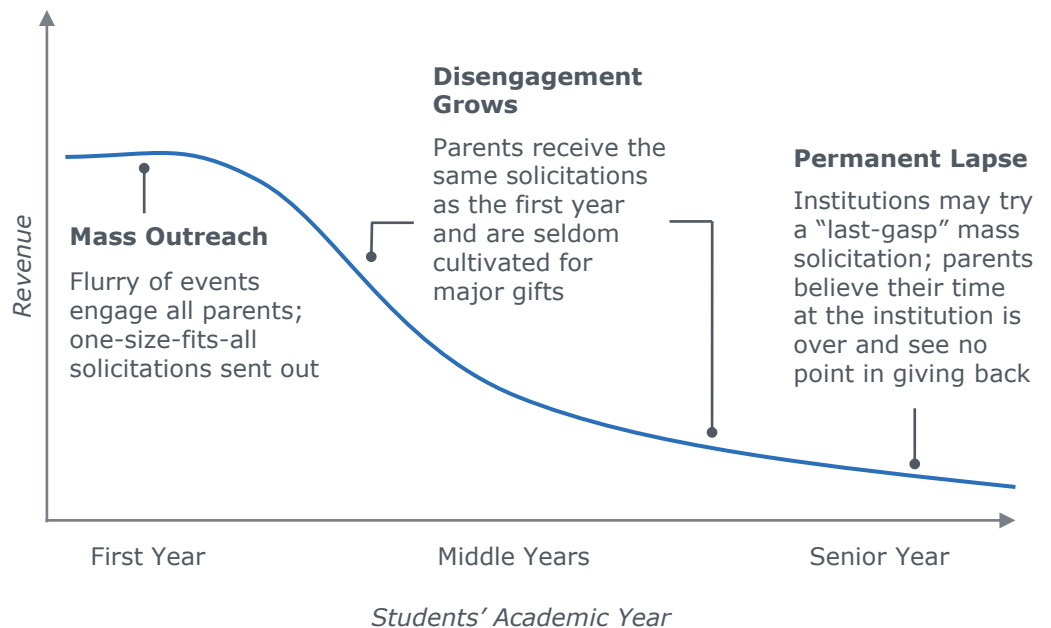
### Focusing on Mass Engagement...

#### Standard Resources Dedicated to Parents

- 0 to 2 staff members
- Parent-centric communications
- Email or phone solicitations



### ...Leads to an Unattractive Parent Giving Trend



Source: EAB interviews and analysis.

# Targeting the Top of the Pyramid

Reversing downward giving trends requires circumventing challenges posed by the majority of parents and reorienting efforts toward the top of the parent donor pyramid. Two of the biggest challenges to parent fundraising are most parents' inability or unwillingness to give philanthropically on top of tuition and a short-term attachment to the school.

However most institutions, regardless of size, location, or Carnegie Classification, have a segment of high-capacity parents who are positioned to make substantial gifts. These parents have a strong history of philanthropy, often at their student's secondary school, and are thus inclined to give more quickly than alumni. Often, they expect to be approached with an ask even before cultivation begins.

## Focusing on High-Capacity Parents

### Status Quo Approach Challenges



#### Skeptical of Giving

*"Parents are already meeting rising tuition costs. Do we dare ask them for additional gifts?"*



#### Too Little Time

*"Parents are with us for only four years. Alumni are with us for their entire lives."*



#### Minimal ROI

*"How do we justify reaching out to all parents when our major gifts office wants to hire another MGO?"*

### New Approach Benefits

#### Primed for Philanthropy

Past giving to private secondary schools and other charities set expectations about support.

#### Inclined to Give Quickly

High net worth and instant affinity shorten the cultivation timeline.

#### Smarter Use of Resources

Staffing and other resources are dedicated to prospects who bring the greatest returns.

Source: EAB interviews and analysis.



# Targeting the Right Parents

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CHAPTER

1

# ‘Our Mission Is Engagement’

Current parent programs often resemble the typical alumni relations model. They focus on large-scale “friendraising” rather than fundraising. They budget heavily for events such as student send-offs, parent orientation, parent move-in, and family weekend. They assume that parents will naturally give back after all the extensive effort devoted to making them feel like part of the college family.

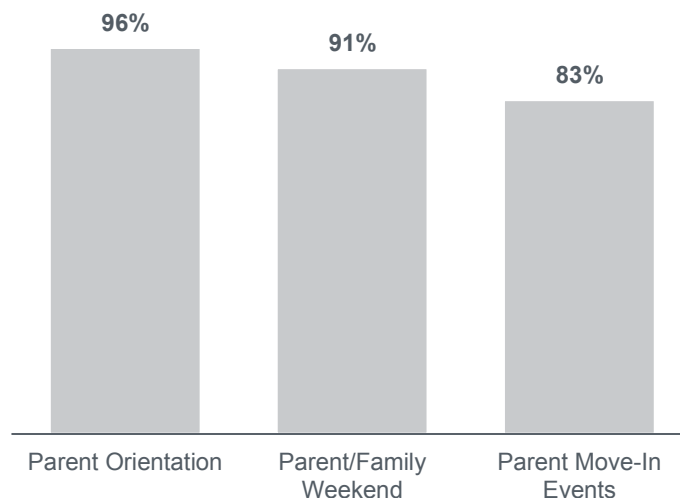
However, while these types of “friendraising” events are important avenues for welcoming parents to the institution, they often crowd out philanthropic endeavors.

With only 6% of parents programs reporting that they are most proud of their fundraising efforts, it is clear that the vast majority of parent programs have a lot of untapped fundraising potential and as a result a lot of room of improvement.

## Typical Parent Focus, “Friendraising”

### Services Offered by Parent Programs

*National Survey of College and University Parent Programs, 2011*



### Parents Largely Influence Their Children

**29%** Of parent programs are most proud of their **parent orientation efforts**

**6%** Of parent programs are most proud of their **parent fundraising efforts**

### Fundraising Is an Afterthought

“Our parent program staff answer parents’ questions every day, we have at least ten events for all parents at family weekend, and we send out a parent newsletter every month. We hope that after all that, they will give back to the institution.”

*Director of Parent Programs  
Private University*

Source: Council for Aid to Education, *Voluntary Support of Education Survey* (2003-2013), <http://vse.cae.org>; EAB interviews and analysis.



# Too Little, Too Late

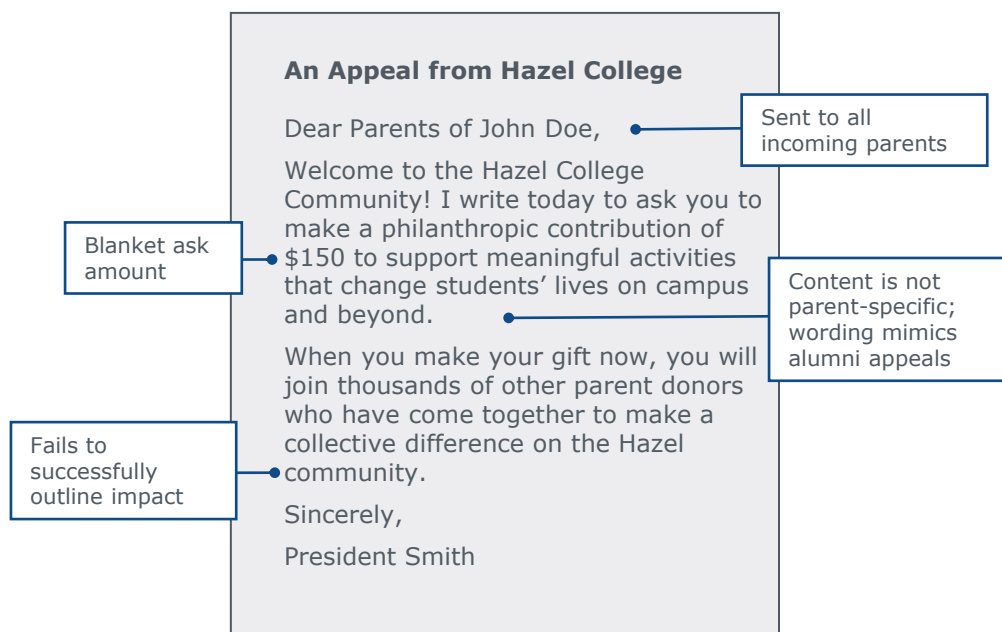
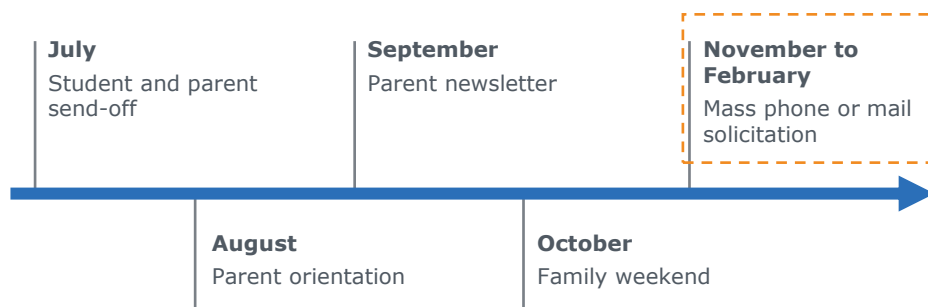
A lack of emphasis on parent fundraising is particularly problematic due to the short window of opportunity the advancement office has to jumpstart parent giving relationships. Despite parents' continued presence "helicoptering" around their students, it is those first few months when parents work hard to figure out their relationship with the institution.

Advancement shops that fill that window with only engagement activities often find that the fundraising appeals sent later fall flat. The window has closed.

If advancement offices do send out mass solicitations, the appeals often fail to resonate with parents. Most ask for a blanket amount, regardless of the parents' capacity or previous giving history with secondary schools. In addition, content is often recycled from alumni appeals without attention to the unique interests of parents or reference to the type of impact parents care about, such as career services and residential life. Copying and pasting the traditional annual fund alumni approach to giving does not work for parents.

## Low-Impact Mass Appeals Follow Engagement Efforts

### Status Quo Appeal Timeline



Source: EAB interviews and analysis.

# One Size Doesn't Fit All

There are two pitfalls to business as usual. First, mass engagement spreads resources thin by heavily cultivating all parents, rather than focusing on those with the most capacity. Second, mass solicitations miss their mark because the majority are sent to those who will not give beyond tuition. If they end up in the hands of a good prospect, the one-size-fits-all invitation is hardly an inspiring ask.

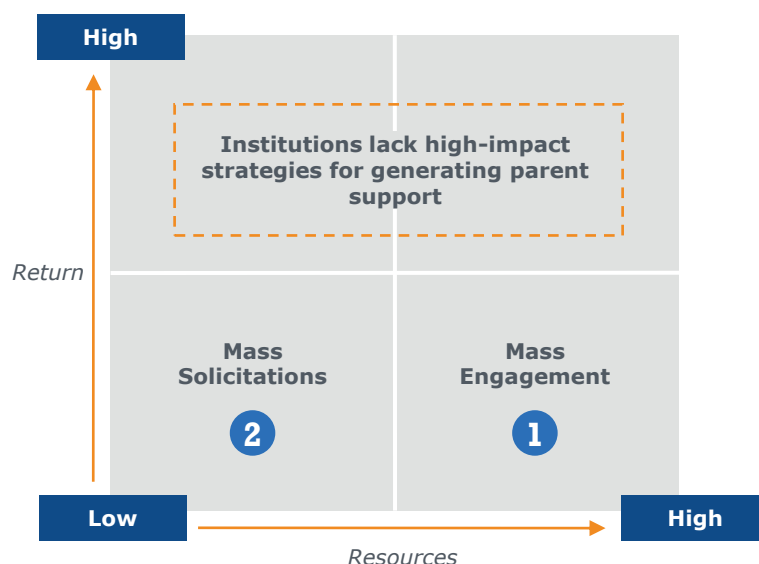
This mass engagement, mass solicitation approach hemorrhages resources, while providing little return. It leaves no room for quality, high-return parent initiatives that focus on the top of the parent donor pyramid.

## Current Initiatives Leave No Room for Targeted, High-Return Strategies

### Two Disadvantages of Business as Usual

- 1 Mass engagement dominates resource allocation**  
Resources go to engaging all parents rather than cultivating those with the highest net worth
- 2 Mass solicitations are scattershot and diluted**  
Most parents won't give, and those who will are not inspired to give to capacity

### Resource Allocations for Parent Initiatives



Source: EAB interviews and analysis.

# Cultivating the Right Prospects

Capitalizing on the window of opportunity and making inroads with parents early in their student's education is accomplished through three steps.

First, systematically gather parent information. Second, filter out the best prospects through qualification. Finally, use targeted, high-touch solicitations to acquire those parents.

## Jump-Start High-Value Relationships with Targeted, Proactive Approaches



### The Window of Opportunity

"We want to be able to screen, identify, and get in front of the right parents within the first three semesters that their child is here. After that, it's much more of a challenge. That window is open widest early on, when parents are still feeling excited."

*David Lieb  
Senior Associate Vice President for Development  
Pennsylvania State University*

## Three Steps to Acquiring High Net-Worth Prospects



### Access Implementation Road Map and Tools

Whether you are just starting your parents program, or evaluating an existing program, find diagnostic questions to help guide your strategy in our related toolkit on page 55 and on [eab.com](http://eab.com).

Source: EAB interviews and analysis.

## The Information Bottleneck

Unfortunately, many institutions have to clear several hurdles on the way to effective parent fundraising. The most common hurdle is an inability to gather parent information, such as addresses, phone numbers, and employer information. This dilemma not only hinders parent fundraising efforts, but often precludes them altogether.

There are three potential pain points in collecting parent information. First, several campus units such as career services and student affairs might have access to parent information but neglect to share it. Second, administrators from some units such as financial aid and admissions might resist sharing information because they believe it should remain private. Third, there may be legal hurdles to take into account; they vary among institutions and require conversations with university or college general counsel.

### Challenges to Collecting Information Impede Cultivation

#### Barriers to Gathering Parent Information



##### Lack of Coordination Among Campus Units

Campus departments gather parent information individually, but neglect to share it with each other and advancement staff



##### Absence of Campus Buy-In

Admissions, financial aid, or institutional research resist efforts to share information between units



##### Potential Legal Hurdles

State and federal law may prohibit advancement staff from aggregating or sharing parent information



#### Access Implementation Road Map and Tools

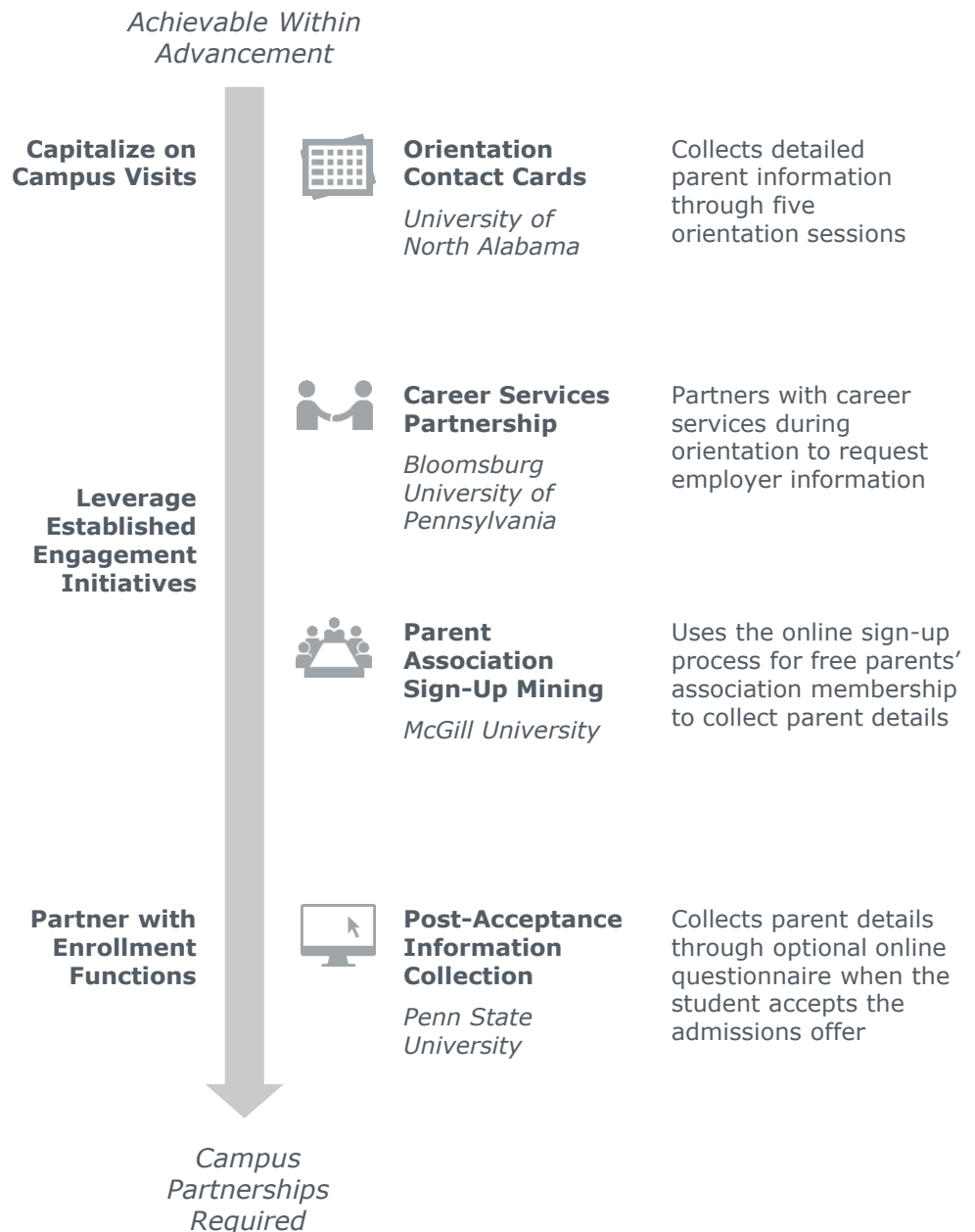
Find key teaching points and discussion guide questions for partnering with campus leaders to gain access to parent information in our related toolkit on page 59 and on [eab.com](http://eab.com).

# Quick Wins for Data Gathering

Luckily, there are a number of institutions that strategically work around these hurdles to gather parent information. Strategies capitalize on parents' campus visits, leverage existing engagement initiatives, or partner with enrollment functions.

While some strategies are achievable within the advancement enterprise, such as University of North Alabama's orientation contact cards, which provide 75% of attendees' information, other strategies require cross-campus partnerships. For example, advancement staff at Bloomsburg University of Pennsylvania realized they could make better inroads with parents through a department of particular parent interest—career services. When career services staff hold sessions with parents about providing internships and mentoring students, they collect parent information and share it with advancement.

## Tailoring Existing Initiatives to Clear Information Hurdles



### Access Implementation Road Map and Tools

Find key teaching points and discussion guide questions for partnering with campus leaders to gain access to parent information in our related toolkit on page 59 and on [eab.com](http://eab.com).

Source: EAB interviews and analysis.

# New Qualification Strategies Needed

After clearing the information hurdle, institutions must pursue targeted qualification strategies to determine which parents have both wealth and affinity. To better qualify major gift prospects, institutions need to capture details missed by capacity screenings and responses to mass solicitations, such as philanthropic desire, family details, and hidden wealth. These are details that major gift officers have the time to discover in their visits with alumni. However, the short window of opportunity for parent solicitation does not afford that same flexibility.

## Parent Giving Demands Quicker, Less Costly Discovery Tactics

Qualification Methods	Benefits	Challenges
Wealth Screenings	Reveal estimated capacity	Do not capture hidden wealth, family details, and affinity
One-time Mass Solicitations	Reach many donors and determine baseline affinity and inclination to give	Take a long time to sift out the most promising prospects and fail to capture true capacity
Frontline Fundraisers	Conduct alumni discovery visits to determine true capacity	Don't have the time to do parent discovery visits

Source: EAB interviews and analysis.

# Shifting Discovery to Parent Volunteers

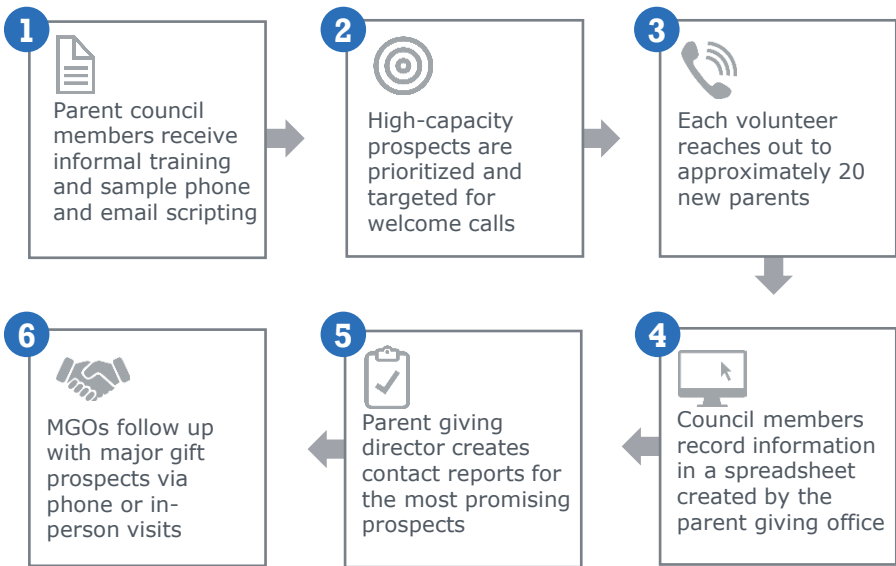
Tufts University gathers additional parent details by inviting parent leadership council members to conduct welcome calls to new first year parents. The call primarily helps new parents feel at home at Tufts, but it also effectively qualifies parents since parent council members can listen for indications of hidden wealth and institutional affinity.

Each parent leadership council member receives a list of approximately 20 high-potential parent prospects to reach out to for a phone call. During the calls, they ask parents if they are interested in joining the Council—which requires a significant donation. An interest there raises a positive flag. After the calls, the volunteers log their interactions in a spreadsheet that the director of the parent giving program reviews for signs of major gift potential.

## Welcome Calls Qualify New Parents

### Welcome Call Process at Tufts University for Parent Leadership Council Volunteers

July to September



#### Access Implementation Road Map and Tools

Find sample email template and a call script to provide to your parent council volunteers in our related toolkit on page 61 and on [eab.com](http://eab.com).

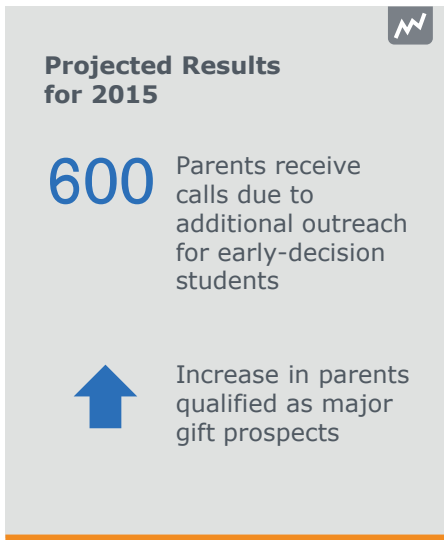
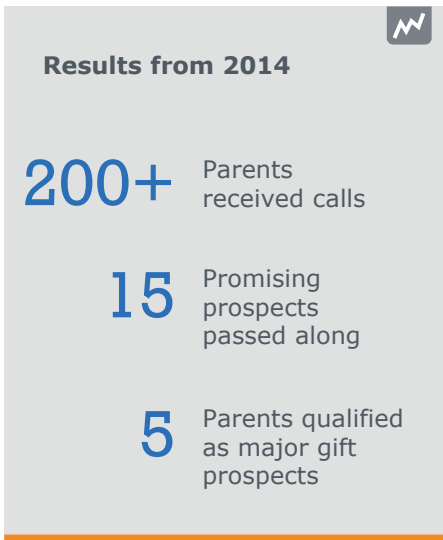
Source: EAB interviews and analysis.

# Calls Surface Major Gift Prospects and Engage Council

Tufts had a promising first year of conducting discovery calls. Parents uncovered 15 prospects, a third of whom qualified as major gift prospects. In the next year, they expect the number of qualified major gift prospects to increase, since they plan to expand their efforts and reach out to the parents of early-decision admits.

Beyond these qualification gains, Tufts has benefited from the opportunity to engage parent council members. This sort of engagement brings parents closer to the institution and cultivates them for their own large gifts in the future. It also jump-starts conversations with parents who might have otherwise rejected outreach from advancement staff. Parents on the leadership council are strong ambassadors for the advancement office and can broker valuable relationships with other parents.

## Promising Early Results at Tufts



## Collateral Benefits

### Engages Parent Leadership Council Members

*"It is as great a tool for identifying prospects as it is for stewarding and cultivating parent leadership council members."*

### Starts Conversations with Future Parent Donors

*"It's an opportunity to get in front of freshman parents and say hello really early when they are feeling good. We want to build that relationship as quickly as possible."*






# Getting on the Fast Track

While soft qualification is useful in gathering parent intel, advancement staff are working within a tight time frame that requires fast-moving alternatives. To secure immediate revenue while also effectively revealing major gift potential, some institutions use solicitations as a means to qualify. This model allows them to fast-track the parents best suited for major gift cultivation.

## “The Best Way to Qualify Is to Solicit”

### The Solicitation-Qualification Model

Key Advantages	
	Fast-tracks parents with high capacity and giving inclinations to major gift cultivation
	Demands fewer resources
	Secures gift revenue immediately while filling long-term pipeline





Institutions use appeals to determine prospects’ capacity and propensity to give



**Appeals Can Raise a Positive Flag**

“Qualification happens all along, and segmented appeals are a large part of that. Any gift of \$5K or more means that they will get more research and attention, and that we will look at where and how they gave.”

Tammie Brush-Campbell  
Assistant Director of Parent Relations  
Gettysburg College

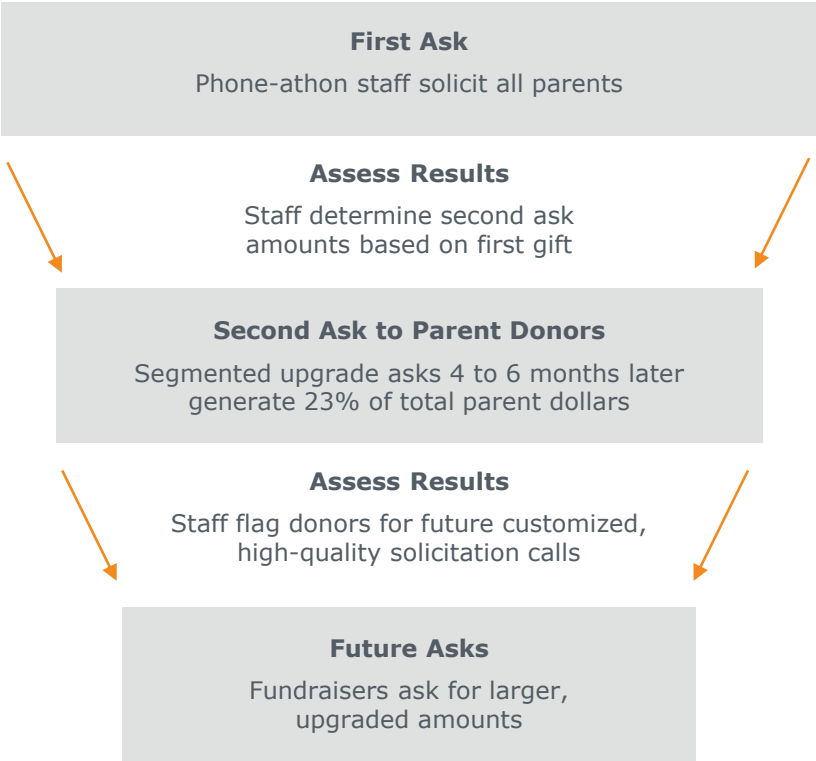
# Winnowing Down the Donor Pool

California State University-Chico (CSU-Chico) uses solicitations to qualify parents by making a few simple adjustments to their standard parent phone-athon program. They first call parents with a blanket solicitation and see how much parents give in response. Based on that preliminary amount, they follow up with parent donors four to six months later and ask for a second, larger gift. The second ask amount is customized to the donor, which means that the institution uses the first gift as a qualification tool.

So far, this strategy has worked well. CSU-Chico has seen 23% of its total parent dollars come in from these "second asks." Outcomes from second asks also give the advancement office valuable information about how much parents might give in the future, which can set the stage for effective, high-value gift cultivation in later years.

## CSU-Chico Uses Multiple Asks to Sift Out the Most Promising Donors

### Surfacing High-Quality Prospects for Cultivation



Source: EAB interviews and analysis.

# Asking for the Right Amount

Like CSU-Chico, the University of Virginia (UVA) found success by incorporating segmented ask amounts into their parent giving strategy. Previously, they used a blanket ask amount of \$2,500 for parents to join the parents committee. With this approach, UVA raised around \$522,000 and rarely had any parents give beyond that \$2,500 mark.

Now, advancement staff map appeals to capacity. Instead of asking for a blanket amount, they segment parents and ask for higher gift amounts—up to \$25,000 annually, if the wealth screening hints that the parent might have capacity. Through this practice, UVA has seen parent revenue increase. Not only do they raise roughly double of what they were raising previously, but they also secured 17 five-figure gifts from new parent committee members.

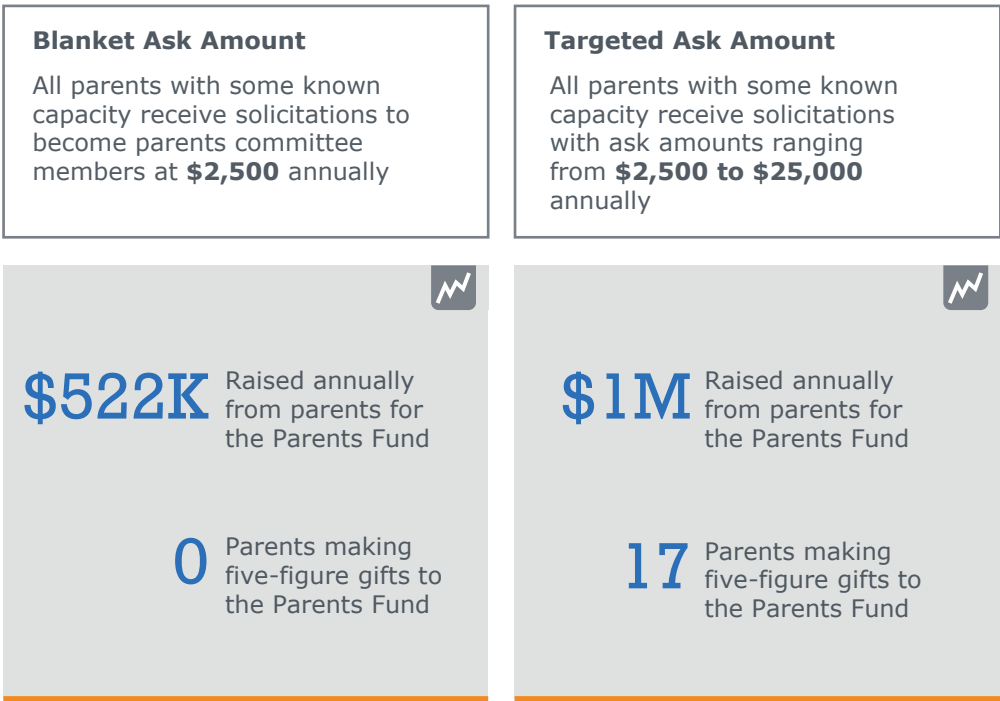
While these are strong immediate revenue returns, UVA staff also now enjoy greater information about who will give in the future. That baseline knowledge is valuable information for later years as they plan cultivation and upgrade strategies.

## University of Virginia’s Parents Fund and Committee Appeals Map to Capacity

### Parent Committee Appeals

THEN (2010) ▶

NOW (2014) ▶



Staff map appeals to projected capacity

Source: EAB interviews and analysis.

# The Old Model: Missing Prime Prospects

The advancement office at Cornell University has taken one step further in the “solicitation/qualification” model. They combined the two elements in a fundraiser’s job description to lead to more effective visits. In their old model, everyone rated at the top of the pyramid—\$250,000 capacity or above—received high-quality, in-person visits from a dedicated parent MGO. Another MGO oversaw the next portfolio tier of 300 prospects. Lacking the time to visit all 300 prospects, or the information to know which prospects were worth her time, this MGO ended up missing great prospects and visiting poor ones.

After analyzing this structure’s low return, advancement leaders realized that information beyond capacity ratings was needed to determine a parent’s likelihood to give.

## Cornell’s Previous Visit Approach Resulted in Low ROI

### Effective Parent MGO Position

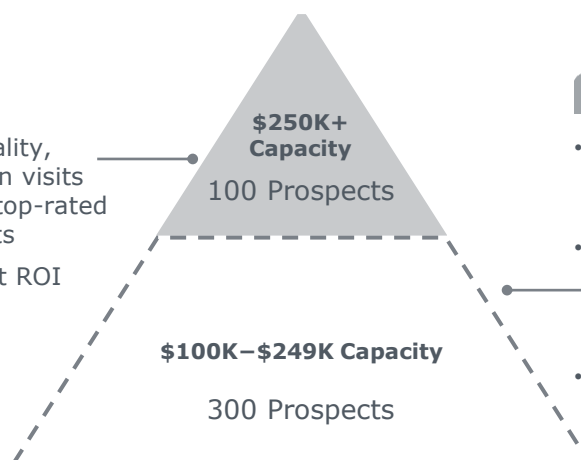


- High quality, in-person visits with all top-rated prospects
- Excellent ROI

### Ineffective Additional MGO Position



- High quality, in-person visits to a fraction of prospects
- Little or no cultivation for the remaining prospect pool
- Low ROI



### Capacity Ratings Are Not Enough

“We were leaving money on the table because we weren’t finding the right prospects. There are factors outside of capacity ratings that we will never know, like how much debt parents have, how many children parents have. Capacity ratings are just a marker for us and we needed something more.”

*Penny Chick, Director of Parent Programs  
Cornell University*



### Access Implementation Road Map and Tools

View sample job descriptions in our related toolkit on page 62 and on [eab.com](http://eab.com).

Source: EAB interviews and analysis.

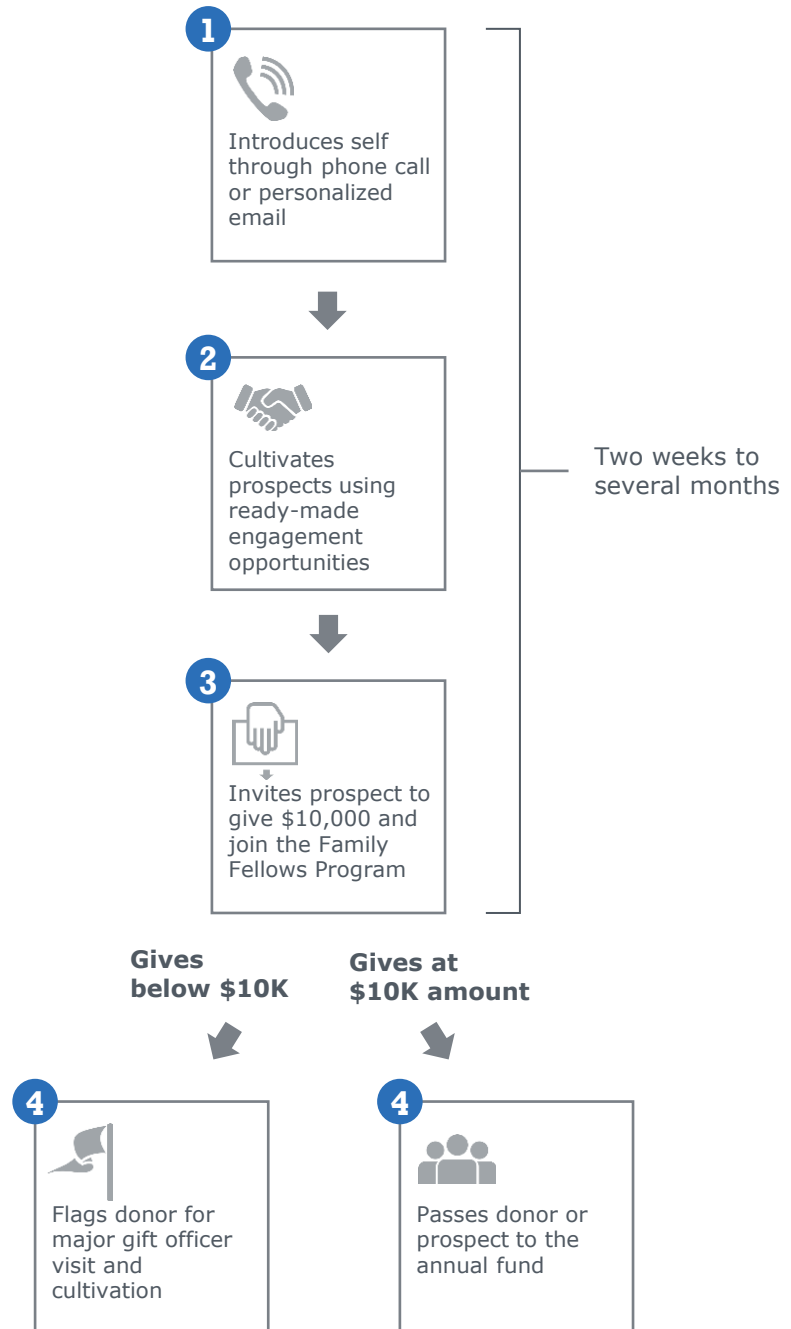
# The New Model: Parent Qualification Fundraiser

The advancement office at Cornell converted the second MGO travel position into a non-travel position dedicated to qualifying prospects through remote solicitations. This qualification fundraiser uses high-quality, personalized email and phone outreach to cultivate and solicit parent prospects for \$10,000 gifts, which is the floor for joining their Family Fellows Program.

Importantly, the solicitations are not one-and-done efforts. The qualification fundraiser flags parents who give at or above the \$10,000 threshold as having capacity and forwards them to a major gift officer for cultivation. The idea is that a \$10,000 gift may be just the tip of the iceberg, and that a major gift officer will be able to unlock the parent's full capacity. The solicitation, in this case, is a litmus test to qualify the parent and determine if he or she is worthy of sitting in a major gift officer's portfolio.

## New Approach Uses High-Touch Phone and Email Cultivation

### Qualification Fundraiser's Cultivation Process for Entire Prospect Pool



Source: EAB interviews and analysis.

# Cornell Sees Increased ROI

So far, both short- and long-term results have been impressive. Of the prospects solicited by the qualification fundraiser, 10% to 20% immediately gave at the \$10,000 level or above. The fundraiser has also identified roughly 20 strong major gift referrals in just three months. On top of that, the advancement shop has saved time and money by avoiding visits to poor prospects. In addition, Cornell has ten first year parents who are already giving \$100,000 in the beginning of the year. This is a number the advancement office would never have reached in the old model.

Staff attribute these gifts to the qualification fundraiser who not only recognized the parents’ potential but also cultivated them and primed them for a large gift ask.

## Qualification Fundraiser Boosts Revenue and Fills the Pipeline

### Impressive Early Results



#### Immediate Mid-level Gifts

10%–20%

Of solicited prospects give at the \$10K level or above



#### Promising Major Gift Prospect Referrals

15–20

Strong major gift prospects passed to MGO between May and July 2014



#### Immediate Major Gifts

10

First year parents giving at \$100K who would have previously been asked for only \$10K in the first year

Source: EAB interviews and analysis.



# Cultivating Parent Prospects

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CHAPTER

2

# The Faltering Middle Years

A strong cultivation strategy is especially important in the middle years of a student's education because it's at this stage that parent enthusiasm starts to drop off. In the first year, parents are on campus for orientation and family weekend, but in the second and third years, they have little reason to return.

On the same note, first-year parents welcome relationships with advancement staff because they are looking for someone to address their questions and concerns about how their student is adjusting to college. However, in the middle years, these concerns wane and parents are not automatically attracted to the idea of keeping a lifeline to the institution—at least not through advancement.

## Parent Enthusiasm Wanes After the First Year

### Second- and Third-Year Parents Are:

- ✗ Less likely to come to campus
- ✗ Less concerned about their child's adjustment to college
- ✗ Less likely to have questions and want to connect with university administrators for answers

#### Diminished Parent Excitement

"Parent engagement starts to drop off after freshman year. Parents often don't come back for another move-in or another family weekend."

*Matt Burrows  
Senior Director, Parent & Family Giving  
University of Michigan*





# Unexplored and Uncertain Terrain

Frontline fundraisers, especially major gift officers, seem well positioned to overcome this apathy. They are experts in building relationships, keeping in touch with promising prospects, and stoking enthusiasm for the institution. They can give top parent prospects the personalized attention they need.

However, frontline fundraisers are often unsure of what to do with parents. Their experience has revolved around alumni, with little attention paid to parents. Gift officers are often unfamiliar with parent interests and uncomfortable with the shorter cultivation timeline.

There are two primary pain points that leave fundraisers unsure of how to approach parents. First, advancement shops suffer from a lack of tools to help fundraisers direct parents up the giving pyramid. Second, fundraisers have undergone little to no training specific to the parent population.

## Gift Officers Are Unsure of How to Cultivate Parents

### Top-of-Mind Concerns



### Primary “Pain Points”

*"What do I say when parents have questions or concerns about their child?"*

*"I've rarely spoken with parents. What are they interested in?"*

*"How am I supposed to cultivate parents within four years? I have a lifetime of cultivation with alumni."*

*"All of our engagement opportunities are for alumni. What can I show parents?"*



#### Lack of Tools

- Fundraisers have few parent-specific engagement opportunities to point donors toward
- Fundraising collateral fails to address parent interests



#### Minimal Expertise

- Professional development opportunities focus on engaging alumni, not parents
- Fundraisers have years of experience soliciting alumni, but little experience with parents

Source: EAB interviews and analysis.

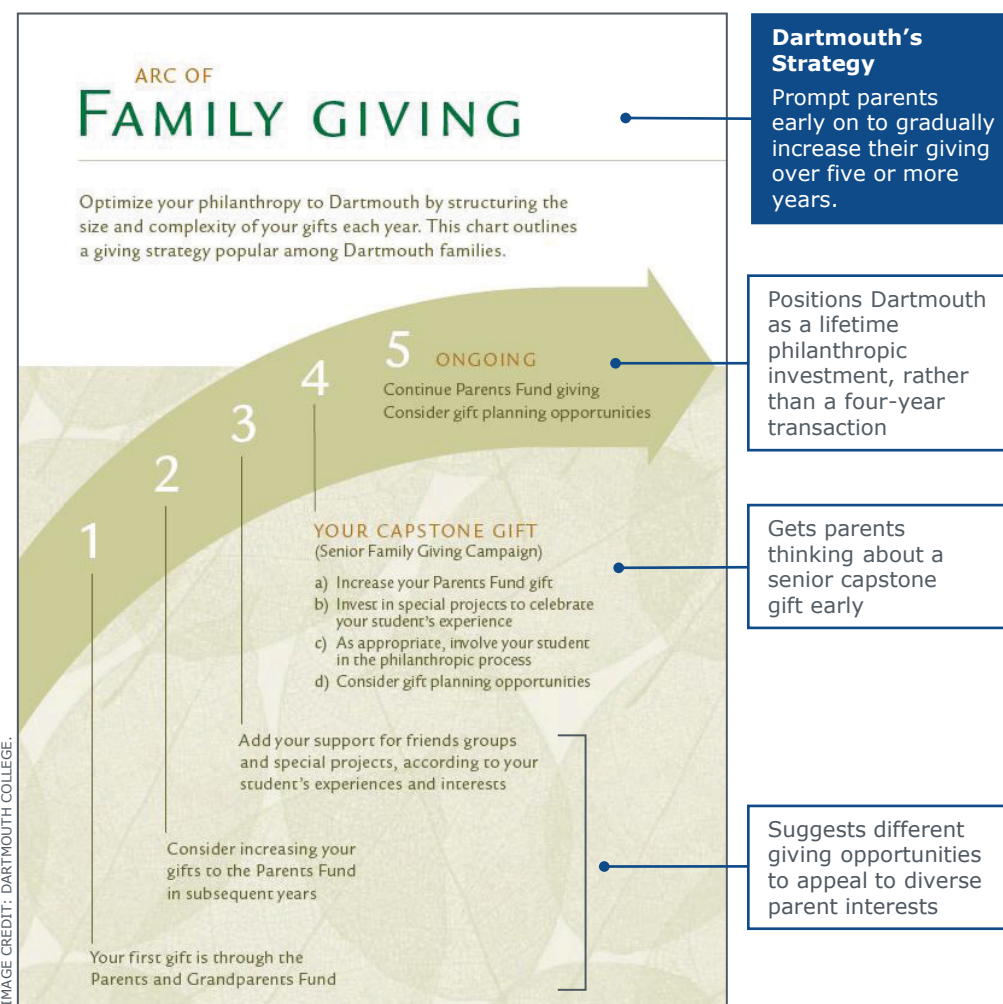
# The Giving Arc Sets Expectations

Dartmouth College addresses this first pain point—a lack of tools—with a physical road map for fundraisers called the “Arc of Family Giving.”

Dartmouth finds that the easy-to-follow guide helps fundraisers establish giving relationships with high-capacity parents early and move them up the giving pyramid over five or more years.

The Arc of Family Giving asks parents to start their philanthropy with a gift to the annual fund and ladder up to a major gift by the senior year. In the middle years, it asks parents for a mix of both unrestricted and restricted gifts and emphasizes funding something of interest to them or their student.

## Dartmouth’s Parent-Centric Tool Outlines Giving Plan for Five Years and More



### Access Implementation Road Map and Tools

Find a customizable template to create your own Family Giving Arc in our related toolkit on page 64 and on [eab.com](http://eab.com).

Source: "Arc of Family Giving," Dartmouth College; EAB interviews and analysis.

# Creating a Road Map

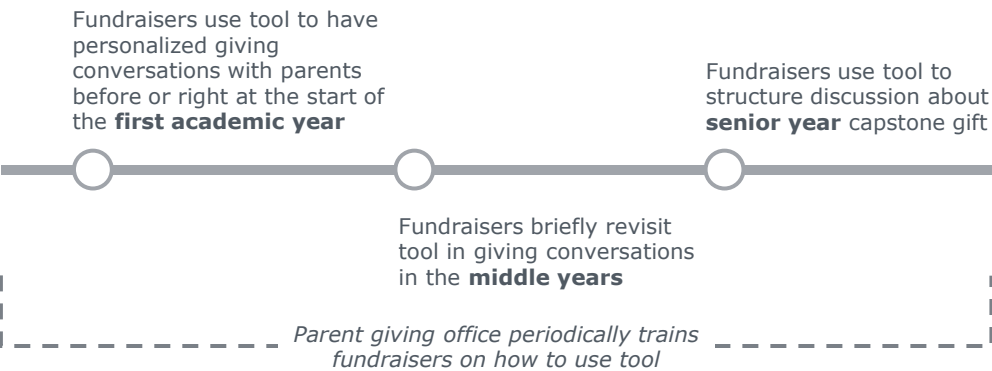
Fundraisers rely heavily on the Arc of Family Giving at the start of the first year when they are building a philanthropic foundation with families. They then revisit this tool in the middle years to jump-start a conversation about a senior year capstone gift.

This tool is particularly useful because it offers a transparent framework for giving conversations. It allows parents and fundraisers to look at the same road map and stay on the same page through five or more years.

The advancement team at Dartmouth has seen upticks in parent giving since using this tool. In fact, in the last five years, total parent giving increased by roughly \$1 million. Dartmouth staff attribute some of these increases to the fact that fundraisers are more focused and comfortable with talking to parents than they were before.

## Giving Arc Tool Guides Fundraisers and Parents

### Tool Touch Points



### Sharpening Giving Discussions

“Before the giving arc tools, conversations were nebulous. But when we started using them, conversation became cleaner. Parents liked it because they knew what to expect for the next nine years. Fundraisers liked it because it made them feel comfortable talking with parents.”

*Heidi Anderson  
Director of the Parents and Grandparents Fund  
Dartmouth College*

Source: EAB interviews and analysis.

# Expectation-Setting Cannot Stand Alone

While Dartmouth's tool sets expectations with parents and helps fundraisers maneuver through conversations, it might not be enough at some advancement shops.

Fundraisers also need high-quality, flexible engagement opportunities to quickly point parent donors toward.

Currently, cultivation opportunities for parents most often consist of parent donor councils, donor dinners at family weekend, and donor-exclusive commencement events.

These events steward donors with a feeling of exclusivity. However, they are difficult to pursue because advancement leaders can't justify their operating costs. Even if these events were financially viable, they are often not sufficient to engage parents since it is hard to get them to return to campus after the first year. And, it is often even harder to get in-demand senior leaders to commit to in-person parent events a couple of times each year. Advancement leaders need other ways to connect parents to the institution.

## It Must Be Coupled with High-Quality Touch Points

### The Problem with Current Parent Programs



Parent Donor Councils



Parent Weekend Donor Events



Parent Donor Commencement Events

#### Drawbacks

- Events can be costly to host on campus
- Parent interest in returning to campus decreases after orientation and move-in
- Access to president and other senior leaders is typically limited

### Searching for the Right Initiatives

"To stay connected with parents without breaking the bank, we need easy ways for fundraisers to get in front of parents and show them that we care about them and recognize their support."

*Director of Parent Programs  
Public University*

# Ready-Made Cultivation Opportunities

Best practice institutions pursue easy-to-implement cultivation initiatives that fundraisers can employ when they need to connect parent prospects with the school.

Two approaches—regional parent programming at the University of Michigan and webinars for parent donors at Cornell University and Duke University—accomplish these goals.

## Two Approaches to High-Quality, Flexible Parent Programming

### Approach 1: Regional Parent Donor Events



Events hosted by parent council members in select cities

### Approach 2: Online Initiatives



Webinars that cover topics of parent interest, such as career services

### Approach 1: Benefits



Targets top parent donors and prospects



Increases engagement through in-person events



On-demand option allows for engagement at any time



Easy-to-use tool for gift officers to point parents toward

Source: EAB interviews and analysis.

# Meeting Parent Donors Where They Are

The University of Michigan’s regional parent programming brings campus leaders to the doorsteps of top parent prospects and donors. Their programming works well for four main reasons.

First, they secure the highest return by traveling to and targeting their very top parent prospects. Staff first mail invitations to the top 200 prospects or donors in a city, and may send out a second wave to the next 100 prospects if they do not receive enough responses.

Second, they request the time of senior leaders who can speak to parent interests, but who are not constantly paraded around the alumni fundraising circuit. Leaders may include the dean of student affairs and the director of career services.

Third, a couple of gift officers attend each event to initiate or continue cultivation in-person.

Last, they drive down event costs by asking parent council members to host events. This also stewards parent council member who hosts the event.

## University of Michigan Brings Underutilized Leaders to Select Cities

### University of Michigan Regional Parent Programming

#### Travel to Top Prospects

Parent giving office brings intimate events to top prospects and donors in large cities

#### Includes Campus Leaders

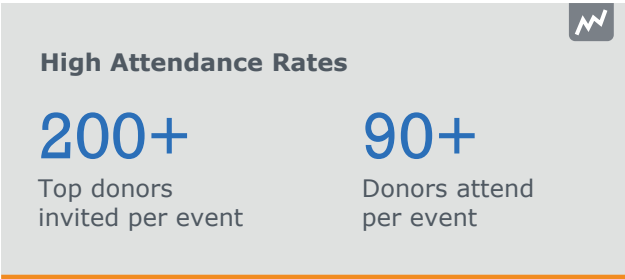
Speakers include range of leaders who address parent interests

#### Vehicle for Engagement with MGOs

Two to three MGOs attend events to engage top donors in person

#### Hosted by Parent Council Members

Events cultivate and steward parent council members



Source: EAB interviews and analysis.

# Redefining Exclusivity

While the University of Michigan has seen success with their regional parent programming, fundraisers also need touch points that don't require busy parents to attend in-person events.

Duke University created Web-X calls for parent donors, which are ready-made cultivation opportunities well suited for busy or far-away parents.

Parents who are council members and give \$1,000 or more receive access to exclusive webinars with senior leaders who can speak to parent interests, such as the director of admissions, the dean of students, and the chair of the board of trustees. This is a useful resource for frontline fundraisers searching for a reason to reach out to one of their parent donors—or alternately, to entice parents to join the parent's council.

On average, the webinars receive 30 to 40 dial-ins each. Most importantly, when parent excitement starts to wane, the webinars give donors an additional perk and another way to connect with the university.

## Duke's Web-X Calls Provide Insider Access in an Easy-to-Implement Way

### Key Elements



Parent-centric topics delivered by campus leaders



Exclusive access for parents council members



Three to four webinars per year

### Web-X Call Speaker List

- Director of Admissions
- Dean of Students
- Dean of a graduate school
- Chair of the Board of Trustees

### Engagement Results

**10%** Of eligible donors join per webinar

**30–40** Dial-ins per webinar

Source: EAB interviews and analysis.

# Multipurpose Engagement Tools

Advancement staff at Cornell University also offer parent webinars. They found that the value of the webinars lies not just in the parent-centric content, but also in the way the content is deployed to parents. The qualification fundraiser at Cornell uses the webinars as tools to broker introductions to prospects, cultivate prospects, and steward donors.

For example, since parents don't always know they have access to the webinars, the fundraiser sends a personalized invitation for the webinar to a prospect to give it an air of exclusivity. She also keeps archived versions of the webinars on hand to give to parents who have specific questions or interests. Finally, she can track whether prospects viewed the webinars and can use the content from it to jump-start engaging conversations. These tactics are personalized and high-touch for parents, but low-effort for the fundraiser.

## Cornell Uses Parent Webinars Throughout Gift Cycle

### Fundraisers Can Use Webinars in Three Ways

#### Introductions

Identify high net-worth registrants and send an introductory email that asks how they enjoyed the webinar



#### Stewardship

Send personalized webinar invitation to donors to create an air of exclusivity

#### Cultivation

Send archived webinars to prospects who have questions about the school

#### A Virtual Icebreaker

"Parents don't always know that they have access to webinars. I can easily create a personalized webinar invite for a donor. If they attend, I might also follow up with them."

Meghan Dauler, Parent Gift Officer  
Cornell University



# Hardwiring a Focus on Parents

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Filling up fundraisers' toolboxes with easy-to-follow road maps and ready-made engagement opportunities is the first step in focusing fundraisers on parents. However, simply making it easier for fundraisers to cultivate parents doesn't necessarily mean they'll do so. Fundraisers have conflicting priorities, and parents often get lost in the mix. Fundraisers also suffer from a confidence gap since their experiences prepare them well for alumni fundraising, but less so for parent fundraising.

Beyond just providing tools, advancement leaders have to communicate the importance of parent fundraising and overcome that confidence gap through training. They also have to make sure fundraisers' incentives are in the right order by setting goals for parent fundraising.

Ongoing training and strategy sessions at Tufts University boosts fundraisers' outcomes, while parent performance incentives at a private, Midwestern college give fundraisers something tangible to work toward.

## Training and Incentives Advance Parent Giving Goals

### Initiative 1: Ongoing Training and Strategy Sessions



Fundraisers receive ongoing professional development

### Initiative 2: Parent Performance Incentives



Fundraisers are evaluated on parent fundraising metrics

Source: EAB interviews and analysis.

# Building Fundraisers' Confidence

Tufts University takes a particularly comprehensive approach to parent fundraising training. Not only does the parent giving office host a formal annual training, but they supplement it with individual strategy sessions.

The 45-minute formal training, titled "What to expect when you are expecting," covers topics such as the factors that make parents unique, ideal initial outreach content, and differences between first year parents, donor parents, and non-donor parents. Fundraisers also receive sample email and phone scripting, and a calendar of prime times to reach out to parents.

In addition to providing formal training, the director of parent giving conducts quarterly 30-minute strategy sessions with each gift officer. The goal of the sessions is to keep fundraisers on track with the parents in their portfolios. Session agenda items include checking the progress of each parent prospect and brainstorming cultivation ideas.

## Tufts Upskills MGOs with Comprehensive Training in Parent Fundraising

### Annual Parent Fundraising Training at Tufts

One-time training session



#### Topics Covered

- Key differences between parents and alumni
- Key differences between first year parents, donor parents, and non-donor parents
- Ideal outreach timelines that align with the student life cycle
- Sample phone and email scripting



Quarterly Strategy Sessions



#### Agenda Items

- Review past tactics to identify strengths and weaknesses
- Check parent outreach
- Brainstorm new cultivation strategies

### Access Implementation Road Map and Tools

Find a guide to training materials for fundraising staff in our related toolkit on page 65 and on [eab.com](http://eab.com).



Source: EAB interviews and analysis.

# Incentivizing Parent Cultivation

Advancement leaders at one private, Midwestern college found that fundraisers were consistently underperforming and that, in addition to training sessions, they needed tangible motivators to focus on parents. As a result, advancement leaders set both behavior-based goals and results-based goals for gift officers to strive toward.

When creating these metrics, leaders made sure to keep the system flexible to account for the differences in experience and portfolio strengths among gift officers.

Metrics, while often controversial, have worked well for this college. Since using them, senior leaders saw fundraiser visits to parents increase by 50% and parent dollars double.

## Private College Uses Written Goals to Focus MGOs on Parents

### MGO Performance Review

Goals differ depending on MGO experience, quality, and number of parents in portfolio

- Behavior-based goals (e.g., number of parent visits with a range of 40%–70% of portfolio)
- Results-based goals (e.g., dollars raised with a range of \$50K–\$100K+ annually)



### Reaching Parent Giving Goals

**50%** Increase in parent visits by major gift officers

**100%** Increase in dollars raised from parents

Source: EAB interviews and analysis.








# Making It Work on Your Campus

Creating new metrics can be tricky. Advancement leaders must choose metrics that are core to performance, rather than inundate fundraisers with superfluous goals. There are a few factors to consider for advancement leaders who decide to incorporate parent metrics.

First make sure that the parent portfolio is a manageable size. Often, portfolios balloon out of control, making goals unattainable.

Then, strategically select one or two parents metrics. When advancement leaders prioritize metrics, MGOs will as well. Next, integrate the metrics into formal review and tracking systems to ensure a sustainable infrastructure. Finally, communicate the metrics to fundraisers through multiple channels, and stick to the metrics.

## Use Metrics to Inspire Performance

Key Steps		Considerations for Developing Parent-Focused Metrics	
Develop metrics			Set and stick to appropriate parent donor portfolio size to prevent portfolio bloat
			Prioritize one to two metrics that will boost performance
			Create a flexible system for determining goals that takes into account varying portfolio strengths and different levels of fundraiser experience
Solidify infrastructure			Incorporate metrics into review grids and electronic tracking system to ensure accuracy and consistency
Implement metric system			Communicate metrics clearly to fundraisers through emails and individual meetings
			Adhere to metrics

Source: EAB interviews and analysis.



# Capitalizing on the Senior Year

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CHAPTER

3

# Senior Year: The Make-or-Break Moment

Senior year, in many ways, is the perfect time to secure gifts from parents. Parents have seen the tremendous impact of the school on their student’s personal and career growth, they have (hopefully) been strongly cultivated for three or more years, and they are engaging with the institution in substantial ways, from attending organization award nights to getting involved with commencement. Senior year is the time to see the results of your years of hard work.

There is an additional benefit to parent giving in the senior year—it lays the foundation for young alumni giving. While most parents may wrap up their giving at graduation, they can still set a philanthropic example for their child before doing so. A major gift in the senior year models the giving behaviors that every institution is hoping to cultivate in their young alumni.




## Time to Secure Major Gifts, Inflect Young Alumni Giving

### Capitalizing on Student Impact

### Laying a New Foundation



### Opportunities for Engagement

-  Thesis completion
-  Organization awards and senior nights
-  Commencement weekend

Source: EAB interviews and analysis.

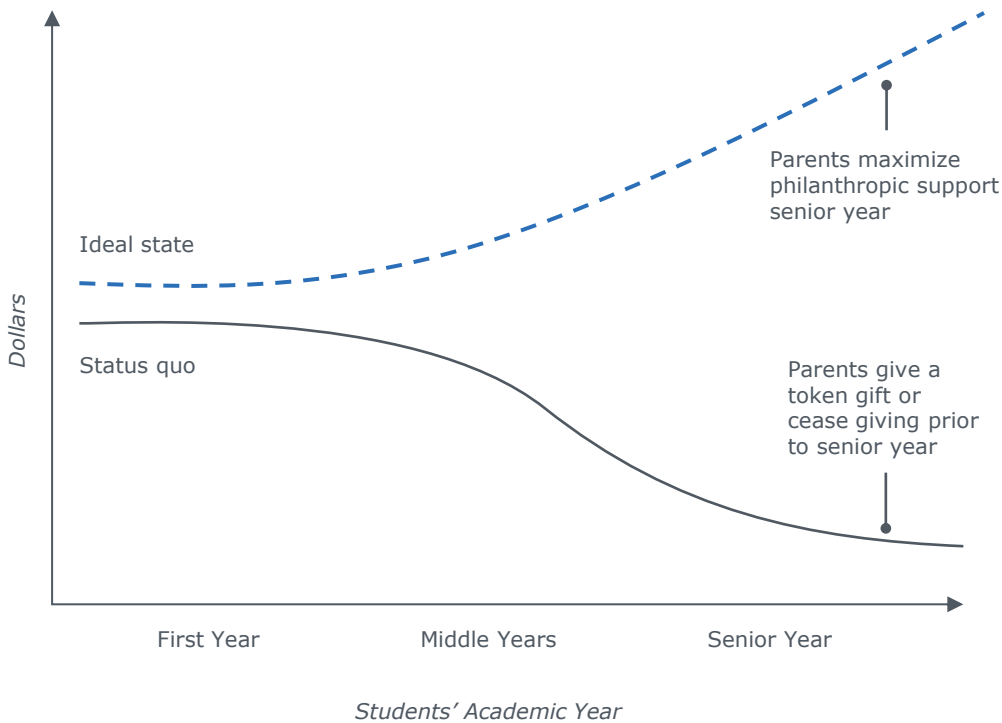
# Missed Potential Senior Year

Yet, most institutions do not take advantage of this prime opportunity. While an alumni donor's last gift is typically the largest, parents' typically give the most in their student's first year. By senior year, many parents have tapped out their philanthropy.

In an ideal state, the first gift would be the start of a strong giving trend. Each year would bring more substantial giving, and senior year would be the capstone moment when high-capacity parents establish their family's legacy at the institution

## Despite Opportunity, Parent Giving Often Bottoms Out

Parents' Multiyear Giving Trajectory



Source: EAB interviews and analysis.

# Reversing a Downward Trend

For many institutions, senior year can look dismal for parent giving. In most cases, institutions completely neglect to pursue major giving. Instead, these institutions send out another round of low-dollar blanket appeals—a tactic that is often referred to as a “last-gasp attempt”—to squeeze out dollars from all prospects rather than a select few high-capacity parents. In the rare instances when conversations about major giving do emerge during senior year, they come out of left field because no groundwork has been laid by fundraising staff.

To reverse this downward giving trend, institutions should set major gift expectations early, preferably in the first or second year. These efforts should focus on top prospects, rather than on the broad swath of parents whose interest is long gone. Finally, strategies should involve students so that the impact of parent giving carries on to a new generation.

## Three Key Elements Leading to a Successful Senior-Year Parent Gift

### What Institutions Do Wrong...

- ✗ Start senior gift conversation in the senior year
- ✗ Send “last-gasp” blanket appeal to all parents
- ✗ View parent giving as a four-year transaction

### ...And What They Can Do Right

- ✓ Set parent donor expectations in the first year
- ✓ Focus on top donors and personalize conversations to their interests
- ✓ Involve students in the giving process to pave the way for young alumni giving

Source: EAB interviews and analysis.



# Building Toward the Major Gift

Advancement staff at Deerfield Academy are veterans in securing major gifts by the senior year. To do so, fundraisers use a model similar to Dartmouth's Arc of Family Giving. Fundraisers ask for a capstone gift amount that is equal or larger to the combined value of three years of annual gifts. Like fundraisers at Dartmouth, they set expectations early, first by laying out a giving road map for parents, which is mailed to all parents in the first week of school, and then by leaving materials with top prospects during in-person visits.

Fundraisers at Deerfield secure significant capstone gifts by progressively building philanthropy over time and making a confident senior year ask. However, advancement leaders at Deerfield don't want the senior year gift to be a one-and-done type transaction. They want Deerfield to remain a philanthropic priority for parents even after their students leave their campus.

To stay connected with parents, Deerfield lets parents give their gift over a three- to five-year period, and continue cultivation and stewardship activities during this time period.

## Deerfield Academy Front-Loads Expectations for Giving Capstone



### The Campaign to Honor the Class of 2015

For more than forty years, the families of each graduating class have come together to fund a legacy project in honor of their children. During the summer of 2014, Deerfield's Board of Trustees approved a \$10 million renovation of the Boyden Library as a signature project of Deerfield's emerging campus master plan. The Campaign to Honor the Class of 2015 will provide funding for an essential component of the Boyden Library renovation: new space for Deerfield's Office of College Advising.

The renovated Boyden Library will bring together, under one roof, the offices of the Academic Dean and Academic Support, the Center for Service and Global Citizenship, the Innovation Lab, and College Advising. This will become a building that promotes interdisciplinary, collaborative learning as students engage in real-world challenges, and will recenter the academic hub on campus, both promoting and reflecting Deerfield's heritage of academic excellence. The new Office of College Advising will occupy a wing of the 2nd floor, providing centralized offices for an expanded group of college advisors, additional group meeting space, and work / research desks for students.

The Academy welcomes your support for this transformational project. Commitments to the Campaign to Honor the Class of 2015 may be paid-in over a 3-year to 5-year period, so we ask families to please consider a gift that is a multiple of their previous giving in support of the Academy.

IMAGE CREDIT: DEERFIELD ACADEMY.

### ← Giving expectations set through...

- Letter mailed to all parents in the first week of school
- Brochure left with top major gift parent prospects after a visit from a gift officer.

### Key Elements from Senior Gift Materials

- Provides four-year giving plan
- Reaches parents in the first year
- Requests that senior year gift amount is a multiple of previous gift amounts
- Allows senior year gift to be paid over a three- to five-year period
- Details comprehensive impact of past senior year gift campaigns

Source: "The Campaign to Honor the Class of 2015," Deerfield Academy; EAB interviews and analysis.

# Mimicking a Mini-campaign

Advancement staff at Deerfield equate their senior capstone gift process to a university campaign that has been condensed into a year and a half. During October and November of junior year, advancement staff work with institutional leaders to identify a couple of projects for parents to fund. When determining projects, they factor in parents' past giving history, parents' projected capacity, and Deerfield's institutional priorities.

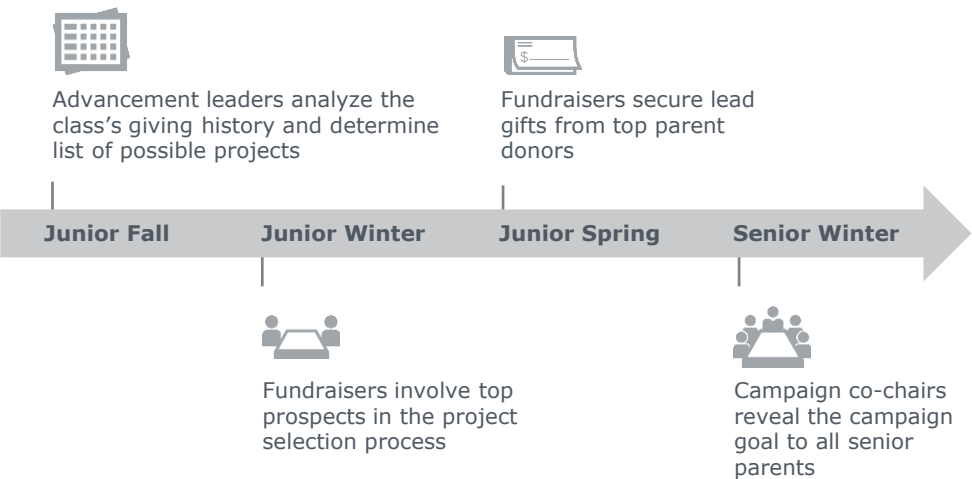
In January of the junior year, staff identify and involve lead donors in the campaign planning process. Fundraisers use lead donors as focus groups to nail down a project and to set the groundwork for the campaign. By the spring time, fundraisers ask these donors for lead major gifts, which often reach \$250,000 each.

The hardest work wraps up by parent's weekend in October of the senior year. At this time, the "public phase" of the campaign begins. The campaign co-chairs, who are typically two of the lead major donors, announce the project to all senior-year parents.

At Deerfield, setting expectations early and focusing on dollars over participation has paid off. The amount raised in the senior year is typically more than all other years combined. The average gift is around \$15,000, though outliers exist at both ends.

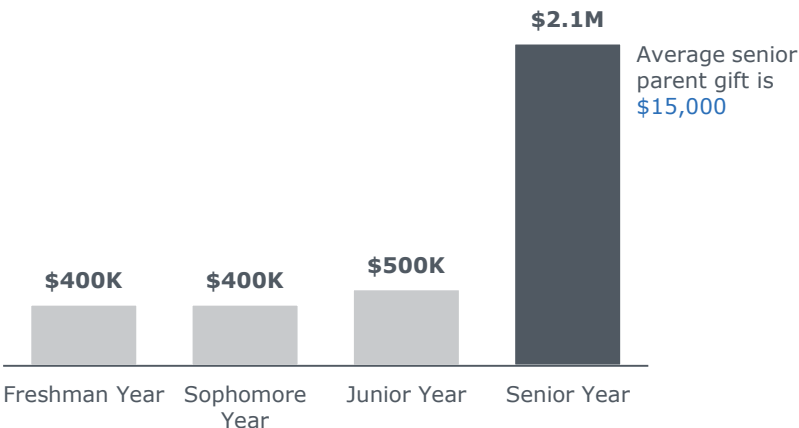
## Deerfield Involves Top Prospects in Planning and Secures Lead Gifts

### Deerfield's Senior Gift Cultivation and Solicitation Process



## Senior Year Gift Outpaces Cumulative Three-Year Giving

### Average Parent Giving by Class at Deerfield Academy



Source: EAB interviews and analysis.

# A Step Beyond ‘One Last Big Gift’

Deerfield’s senior year capstone gift process is tried and true. Advancement staff have built a strong model for capturing major gifts in the senior year by building off of the engagement from the past years and tightly executing on a mini-campaign structure.

The next frontier that advancement leaders are experimenting with is bringing students into the gift process. Institutions take two approaches: either they ask parents to make gifts in honor of their student, or they ask that parents makes gifts in collaboration with their student.

## Institutions Leverage Parent Giving for Young Alumni Philanthropy

### Current Best Practice



#### Parent Major Gift Solicitations

Institutions leverage parent engagement and past giving to secure major gifts from top donors



### The Next Frontier



#### Joint Parent-Student Gifts

Institutions pursue strategies in which parents make gifts in honor of or in collaboration with their child

Source: EAB interviews and analysis.

# Modeling Giving Behavior

The reason some advancement shops are looking to parents to model giving behavior is because parent giving influences their children’s eventual giving. In fact, adults are twice as likely to be active donors if they saw their parents being philanthropic.

However, some advancement shops are unsatisfied with the knowledge that students are simply observing their parents’ philanthropy. They want to hardwire a stronger connection between parent and young alumni giving. To do so, they ensure that students have a role to play in their parents’ giving.

## Young Alumni Donors Follow Their Parents’ Examples

### The Parent Donor Difference



52%

Of adults who watched their parents frequently support nonprofits are today active donors



26%

Of adults who rarely or never saw their parents give are currently active donors

### Getting Students Involved

“It really isn’t enough to just assume that young alumni are going to be donors if their parents are. We have to get them involved, help them understand why their parents donate, and show how impactful giving to the university can be.”

*Director of Parent Giving  
Private University*

# The Parent-Student Endowment

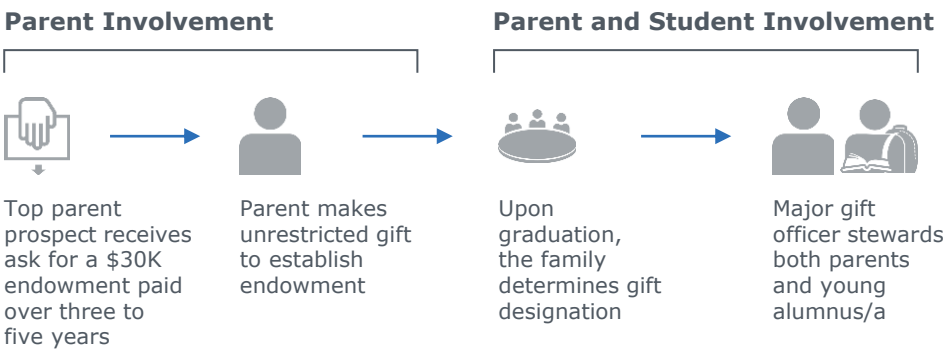
Georgia Institute of Technology (Georgia Tech) has been experimenting with an endowment initiative that both nails down major gifts from their highest-capacity donors and involves students in the giving process.

Fundraisers first solicit their top parent donors for a gift of \$30,000 for an unrestricted endowment. The gift request occurs within the freshman or sophomore year. Then, typically around graduation, they bring the student into the conversation and work with the family to reflect on the past year and decide where to allocate that gift.

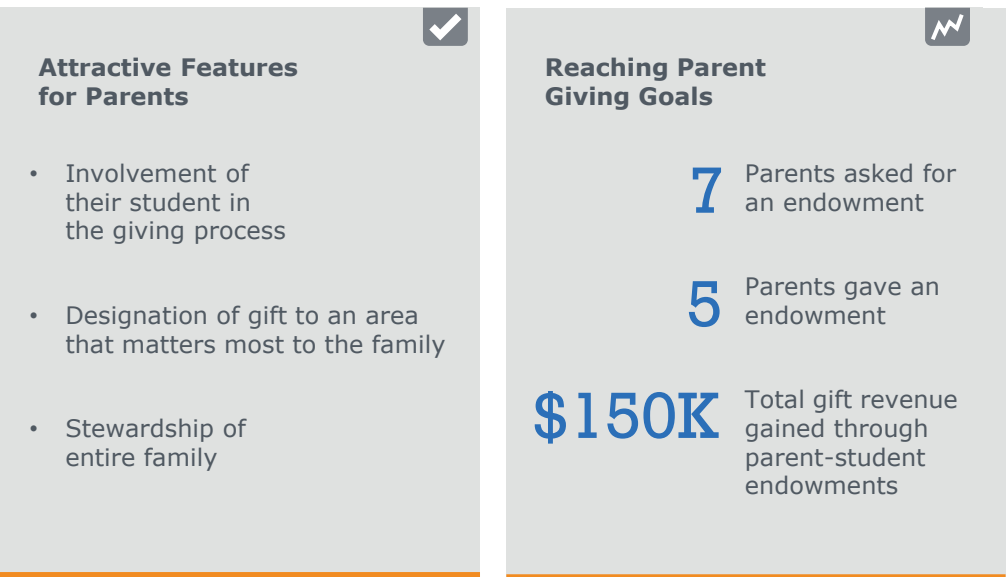
Moving forward, Georgia Tech will steward both parent and student by bringing them to events on campus and allowing both to continue to give to their established fund. Even though the parent-student endowment initiative is new, it is generating positive returns at Georgia Tech. Of the seven parents approached for an endowment, five have given. This is to \$150,000 in gift revenue that Georgia Tech would have otherwise not received.

## Georgia Tech Experiments with Involving Students in Gift Allocation

### Georgia Tech’s New Parent/Family Endowment Effort



## New Parent-Student Endowment Option Resonates with Top Donors



Source: EAB interviews and analysis.

# Reorienting Toward the Top

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Parent giving has the potential to both pad immediate bottom-line revenues and develop a culture of philanthropy for the next generation of lifetime alumni donors.

Institutions are already on the right path if they are thinking critically about targeting parents. The next shift that institutions must pursue is the move from a low-return, one-size-fits-all model to a targeted model that directs resources to the top of the parent donor pyramid.

Overall, there are four key steps to maximize parent giving. First, focus on top parent prospects and acquire those parents early through smart identification and qualification strategies. Second, look to frontline fundraisers to deepen parents' giving relationships with the institution. To get fundraisers comfortable with parent philanthropy, equip them with ready-made cultivation opportunities that they can easily point parents toward, train the fundraisers, and give them goals to strive for.

Next, set giving expectations early so major gift conversations between fundraisers and parents are fluid and productive. Last, leverage the senior year to jump-start young alumni giving, ensuring that efforts spent on parents last well beyond their final gift.

## Four Key Lessons for Maximizing Parent Donor Impact

### EAB Study Insights

#### 1 Acquire Top Prospects Early

Identify and acquire top parent prospects early through smart qualification strategies and segmented solicitations

#### 2 Empower Frontline Fundraisers

Deepen parent donors' relationships with the institution by equipping gift officers with ready-made cultivation opportunities and high-value training sessions

#### 3 Share Major Gift Road Map Early

Set giving expectations early with top parent donors to secure senior-year capstone gifts

#### 4 Involve Students in Giving

Leverage the senior year parent giving relationship to jump-start young alumni philanthropy

Source: EAB interviews and analysis.



# Parent Fundraising Implementation Guidance

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TOOLKIT

# Toolkit Overview

**Overview:** For institutions seeking to enhance an existing parent fundraising program or to initiate a new one, this toolkit can help members jump-start their efforts. The tools are designed to be utilized by development staff and leadership in partnership with student affairs leadership (where applicable) to set strategy, gain access to parent data, and build their program.

## Tool contents and descriptions:

Tool	Description	Page
Decision/self-reflection guide	List of questions to help kick off or evaluate a parent program	57
Strategic implementation guide	Guide to help set program vision by evaluating tactics provided in this publication to determine their relevance and your preference for implementation	58
Conversation guide for key campus allies	Guide to support an institution's ability to share parent data by preparing development leadership to discuss why they need access and how it will be utilized	59
Parent welcome email template and parent council calling script	Editable template to support parent council members in welcoming first year parents to the family	61
Sample parent fundraising job descriptions	Job descriptions for two different parent fundraising positions your organization can create	62
Family giving arc template	Overview of the editable giving arc template that can be found on eab.com	64
Resources for supporting the addition of parents to major gift officer portfolios	Overview of the training deck created from this work, which can be edited and used to help educate your fundraising team (deck is available on eab.com)	65



# Key Questions to Kick Off or Evaluate a Parent Program

## Decision/Self-Reflection Guide

### Instructions

Use the following discussion/self-reflection guide and the implementation tool that follows to help you prioritize the implementation of the best practices provided in this publication based on your institution's goals, available resources, and timeline.

---

### Starting a Parent Fundraising Program?

1. What strategies can we pursue to gather parent information (e.g., name, contact information, employer information, etc.)?
2. With whom on campus do we need to speak in order to obtain this information?
3. In order to gather parent information, how might advancement capitalize on parents' campus visits, leverage existing engagement initiatives, or partner with enrollment functions that already gather data?
4. Which employees will work with parents? Who will lead the program?

### Already Have a Parent Fundraising Program?

1. What tactics do we have in place to qualify parents?
  - Could we improve the way we collect parent data to aid the qualification process?
  - Could we improve our process by including parent volunteers?
2. Do our existing parent solicitations:
  - Include asks with targeted amounts that map to the prospect's capacity?
  - Mention impact of gifts?
  - Appeal to parents' interests?
3. What parent-specific engagement strategies do we have in place?
  - What's currently working well?
  - Who from campus administration do we need to engage that can help us develop parent-specific content for outreach, engagement, and/or stewardship?
  - What alumni engagement tactics could we repackage for parents?
4. What efforts do we have in place to solicit major gifts from parents in the senior year?
5. Questions specifically for fundraisers: How comfortable are you with cultivating parents? What questions would you like answered to increase that level of comfort?

# Setting Program Vision

## Strategic Implementation Guide

### Instructions

Based on your institution's parent fundraising goals and available resources, map out which of the tactics profiled in this publication you want to prioritize using the chart below. Use this vision document to assign program responsibility and next steps.

Tactic	Immediate	Possible for Future	Not Applicable	Staff Assigned	Next Steps	Page
Parent Discovery Calls						23
Targeted Parent Council Invitations						24
Strategic Qualification Through Mass Solicitations						25
Qualification Fundraiser						29
Giving Arc Tool						34
Regional Parent Donor Events						38
Parent-Centric Webinars						39
Parent Fundraising Training						42
Parent Fundraising Metrics						43
Senior-Year Capstone Gifts						49
Parent-Student Endowments						53

Source: EAB interviews and analysis.

# Obtaining Parent Data

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## Conversation Guide for Key Campus Allies

### Instructions

Use this discussion guide to assist you as you speak with other campus leaders about obtaining access to parent data for engagement and fundraising purposes. We have included key partners in this work including, but not limited to: student affairs, financial aid, university or college counsel, and CIO.

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### Talking Points for Why We Want to Engage Parents in Advancement

- The advancement team has been and continues to be focused on engaging our alumni in supporting the institution, but even with that focus we continually need to look to diversify our fundraising sources.
- Higher education institutions are increasingly turning to a new market to diversify their revenue sources—parents.
- Parents are a logical constituency to look to as we expand our fundraising streams for a number of reasons:
  - The current generation of parents is particularly invested in their student’s welfare.
  - Bringing parents into a donor role allows them to get answers to questions, while also keeping them financially invested in the organization.
  - Parents are interested in supporting programs that directly benefit their student while they are on campus.
  - Past giving to private and secondary schools and other charities can set expectations about support. Many parents expect to hear a request for support early in their student’s education.
  - High net worth of parents and their instant affinity when their child is accepted into the college or university of their choice shortens the time from first gift to ultimate major gift we typically follow with alumni donors. We can raise more from current parents if we start early in the freshman year.
  - Research shows that parent giving has the potential to inspire young alumni giving, something that we need to focus on as our students matriculate and then become alumni.
- To do this work, we need support from key allies across campus—first to obtain the parent data we need to make meaningful connections with parents, and second to engage them after we secure financial support.

### Critical Questions for the General Counsel

- I understand that advancement is legally allowed to access parent name, demographic, and contact information. Does advancement currently have the ability to gain access to this information? If not, what measures need to be implemented so that fundraisers can gain access to parent information?
- How can we educate colleagues in student affairs, admissions, and financial aid about which personal parent information is and should be accessible to advancement?
- What other legal issues should we be aware of as we move forward with parent fundraising?

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## Conversation Guide for Key Campus Allies (cont.)

### **Critical Questions for Chief Information Officer**

- How many different information systems exist on campus?
- Which systems house parent information?
- Who do we need to contact to gain access to the parent information we as an institution collect?

### **Critical Questions for Student Affairs**

- What type of parent information is being collected within admissions and student affairs?
- Could advancement gain access to that information? If not, what are your concerns?
- Do you collect additional information after a student formally accepts admittance? What parent information is collected at that time?
- Could both student affairs and advancement benefit from asking for additional contact and demographic information from parents?
- What are the communication touchpoints for parents after admittance and acceptance?
- What does your parent communication plan look like across the student's four years of college?
- What needs do you have in student affairs that we might be able to interest parent volunteer and donors to support?
- Who else should we contact about our desire to collect parent data?

### **Critical Questions for Financial Aid**

- What types of parent information is being collected on the FASFA form?
- Could advancement gain access to this information?
- Could advancement at the very least gain access to the full-pay parent list as well as a list of parents whose student is receiving financial aid?

# Welcoming Parents to the Family

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## Parent Welcome Email Template and Parent Council Calling Script

### Instructions:

Use the following framework below to design your email template and script for parents advisory council members or gift officers tasked with initial outreach to incoming first year parents.

---

### Parent Welcome Email/Letter Template

**Introduction:** Address the following questions:

- Who are you (the writer)?
- Why are you writing to them today?
- Why should they read this email?

**Parent/family program description:** Address the following questions:

- What is the parent council?
- What do you do that is unique and helpful to parents?
- What is required of those who join (include the threshold gift for becoming a member)?

**Ask or indication of the next step:** Request to talk with them more and welcome them in person via phone within a specified timeline.

**Thank you:** Include a line of personalized thanks from the sender in anticipation of the future call.

### Parent Council Calling Script and Talking Points

"Hello: **Parent Name**, my name is \_\_\_\_\_ and I wanted to take a moment to follow up on the email/written introduction that you should have received from me last week. As the parent of a **class year** student here at **Institution Name**, I know just what you may be feeling as you prepare to send your student to campus. I wanted to reach out on behalf of the Parent Council to welcome you to the **Institution Name** family and serve as a point of reference for you."

Share information on the parent council using your internal materials, determine what you're comfortable sharing to build rapport, and use a selection of some of the following questions to assist you in with the conversation:

- Is this your first college student?
- How old are your other children? Where do they go to school?
- Were you active as a volunteer at their high school?
- Are you interested in learning more about **Institution Name's** parent council?
- Would you like to join the parent council with a contribution of **\$ amount**?
- Are you planning to attend the send-off in your area?
- Are you planning to attend parent's weekend? (You can offer to meet in person then.)
- What questions do you have about the university/college that I can address or that I might be able to connect you with the appropriate staff member to discuss?

# Finding the Right Staff

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## Sample Parent Fundraising Job Descriptions

### Instructions

Use the following job descriptions to craft your position posting for a parents fundraising position. In some instances the position may be either housed in Student Affairs or have dual reporting to Student Affairs.

---

### Sr. Associate/Associate Director, Parents' Fundraising

#### Job Description:

The Associate or Senior Associate Director, Parents' Fundraising reports to the Director of Parents' Fundraising and is responsible for the direct cultivation, solicitation, and stewardship of domestic and international **Institution Name** parents capable of gifts in the range of \$100,000 to \$2,500,000. The Associate or Senior Associate Director will manage a portfolio of prospects, heavily weighted toward current parent donors and prospects. The successful candidate will be expected to meet specific goals within the context of a major Capital Campaign; devise strategies for the engagement and comprehensive solicitation of prospects; work with other staff members to maximize fundraising productivity; provide staff support for volunteer committees as assigned; and develop productive working relationships with key volunteers. In addition, the Associate or Senior Associate Director is responsible for the administration and planning of programs to specifically engage international **Institution Name** parents as volunteers and donors. Responsibilities include: administrative management of parent-related programs adapted for international parents, including the Parents' Leadership Council; participation in and support of University-wide programs such as First-Year Orientation and Parents' Weekend.

#### Requirements:

- A Bachelor's degree.
- A minimum of five years fundraising experience.
- Or a combination of one to two years of fundraising plus three to five years of other directly related experience in admissions or student affairs.
- Travel and some evening and weekend work is required to be successful.
- A demonstrated ability to speak and write persuasively about higher education.
- Proficiency with technology and relevant software applications, such as email, MSWord, MExcel, and PowerPoint is expected.
- The successful candidate will be a mature team player who is highly motivated and dedicated to the goals of advancing higher education.
- The Associate Director must have: 3-5 years of fundraising experience in a higher education environment.
- The Senior Associate Director must have: 5-7 years of fundraising experience in a higher education environment.

#### Preferred:

Strongly prefer experience in a complex higher education fundraising environment with high-level volunteer recruitment and management experience. A proven track record of successfully soliciting and closing gifts over \$100,000.

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## Sample Parent Fundraising Job Descriptions (cont.)

### Manager/Director Parent Programs

#### Position Overview:

Working in close collaboration and partnership with the Director of Alumni Relations and AVP of Development and Alumni Relations, the Parent Program Manager will develop and execute a comprehensive strategy to engage parents to transform the culture of engagement at **Institution Name**, building, nurturing, and strengthening relationships with key members of the **Institution Name** community, resulting in lifelong engagement with and in support of the college/university. The Parent Program Manager is responsible for increasing the engagement and giving of parents, and reporting progress through the development of strategic engagement metrics. The Parent Program Manager is an effective communicator, serving as a voice on behalf of the college/university, and will serve as a liaison between parents and other offices with the **Institution Name** community.

#### Responsibilities:

- Develop active parents' engagement program, with both short- and long-term engagement goals, communications plan, Parent Fund and related collateral, etc.
- Identify, develop and sustain programs and activities that best serve the college/university and effectively meet the identified needs of the **Institution Name** parent and legacy family community.
- Work closely with the Director of Alumni Relations to identify opportunities and build strategic partnerships, both within the campus community and with constituents beyond campus.
- Work closely with the Development team on the creations of the The Parent Fund.
- Develop a pool of prospects for individual cultivation and solicitation in coordination with advancement initiatives.
- Manage, maintain and effectively steward the departmental budget.
- Respond to parent outreach/inquiry in a timely, helpful and appropriate fashion.
- In conjunction with Advancement Services, coordinate the collection of constituency engagement data on a consistent and continual basis.
- Other duties as assigned.

#### Qualifications:

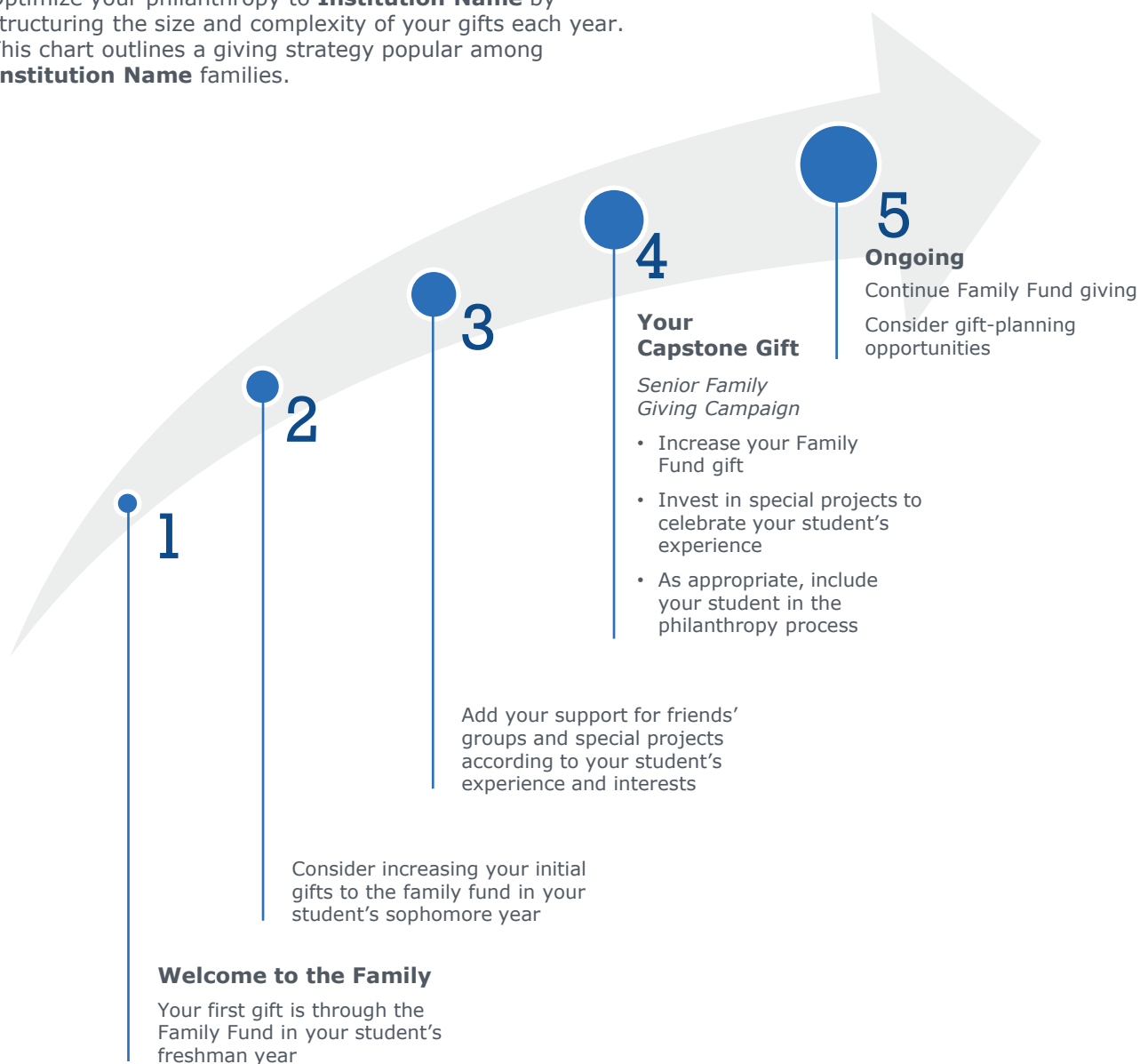
- Bachelor's degree required.
- Five or more years' alumni and/or parent engagement and annual giving experience.
- Thorough knowledge of the principles and practices of alumni and parent engagement.
- Five plus years in higher education advancement preferred.
- A deep appreciation for and an ability to successfully articulate the mission and aspirations of **Institution Name**.
- Outstanding strategic planning skills that include the ability to develop, implement, and monitor short- and long-term goals for engagement, donor growth and retention.
- Familiarity with tracking systems and a high degree of comfort with using technology to communicate and share information. Millennium experience preferred.

# A Tool for Setting Expectations and Aiding MGOs

## Family Giving Arc Template

### The Arc of Family Giving

Optimize your philanthropy to **Institution Name** by structuring the size and complexity of your gifts each year. This chart outlines a giving strategy popular among **Institution Name** families.



[Insert motivational or mission-related statement here]

### Downloadable PowerPoint Template

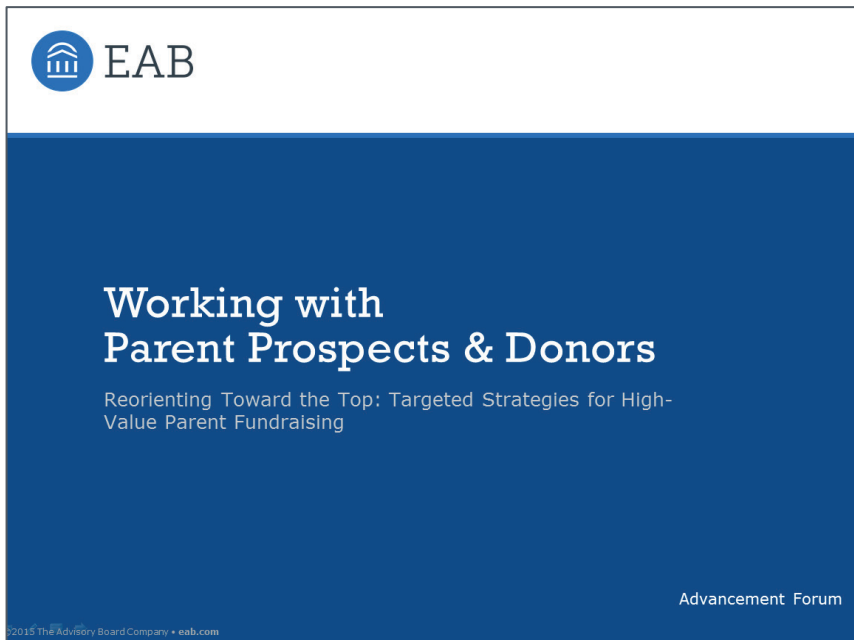
Visit [eab.com](http://eab.com) and search "Giving Arc" to download a customizable template you can begin using immediately.

Source: Adapted from Dartmouth University, Hanover, NH; EAB interviews and analysis.



# Training the Team to Work with Parents

Resources for Supporting the Addition of Parents to MGO Portfolios



## Downloadable PowerPoint Template

Visit [eab.com](http://eab.com) and search "Parent Prospects" to download a parent fundraising training deck with speaker notes.

Source: EAB interviews and analysis.





# Advisors to Our Work

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## With Sincere Appreciation

The Education Advisory Board and the Advancement Forum are deeply grateful to the organizations and individuals that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals and institutions for being particularly generous with their time and expertise.

### **Beloit College**

Mark Wold  
Senior Director of Alumni and Parent  
Relations and Annual Support

### **Bloomsburg University**

Doug Kleintrop  
Director of Development

### **Brown University**

Rachel Spaulding  
Director of the Parents Program

### **Bucknell University**

Ann DiStefano  
Director of the Parents Fund and  
Family Programs

### **California State University-Chico**

Allen Lunde  
Assistant Director of the Annual Fund

Patty Crabtree  
Associate Director of Alumni and  
Parent Relations

### **College of Charleston**

Ann Treat  
Assistant Director,  
Parent Giving Programs

### **Colorado State University**

Ginny Fanning  
Director of Development

### **Cornell University**

Penny Chick  
Major Gift Officer and Director  
of Parent Programs

Meghan Dauler  
Parent Gift Officer

### **Dartmouth College**

Heidi Anderson  
Director of the Parents and  
Grandparents Fund

Mike Griesi  
Administrative Assistant for the  
Parents and Grandparents Fund

Joyce Hammel  
Assistant Director of the Parents  
and Grandparents Fund

### **Deerfield Academy**

Bill Barry  
Director of Parent Giving (former)

### **Duke University**

Heather Bennett  
Director, Parents and Young Alumni  
Programs, Duke Annual Fund

### **George Washington University**

Rachel Jarvis  
Senior Director for the  
Parents Campaign

### **Georgia Institute of Technology**

Joan Rober-Jones,  
Director of Development, Parent  
Giving, and Student Affairs

### **Gettysburg College**

Tammie Brush-Campbell  
Assistant Director of Parent Relations

### **Gettysburg University**

Betsy Diehl  
Director of Parent and Family Giving

### **Hope College**

Sabina Dewitt  
Director of the Hope Fund

### **Indiana University of Pennsylvania**

Evan Bohnen  
Associate Vice President of Development

### **Massachusetts Institute of Technology**

Katie Maloney  
Director, Parents Association and  
Student/Alumni Relations

### **McGill University**

Shana Szikman  
Director of the Parents Program

### **North Carolina State University**

Sterling Frierson  
Director of Regional Giving and  
Priority Projects

### **Pennsylvania State University**

David J. Lieb  
Associate Vice President for  
Development

### **Portland State University**

Meagan Bataran  
Director of Annual Giving

Cory Hukill  
Associate Director of Annual Giving

Eric Siegfried  
Telefund Manager

### **Salisbury University**

Jayme Block  
Director of Alumni Relations and  
Gift Development

### **Sonoma State University**

Laurie Ogg  
Director of Annual Giving and  
Alumni Relations

### **Stanford University**

Jane Harrison  
Director of Stanford Parents' Program

### **Stony Brook University**

Anthony Cerna  
Director of Annual Giving

### **Tufts University**

Gina DeSalvo  
Director of Parents Giving Program

### **University of Alabama at Birmingham**

Becky Gordon  
Associate Vice President for  
Development

Randy Kinder  
Senior Director of Annual Giving

### **University of Alberta**

Sean Price  
Associate Vice President of  
Alumni Relations

Colm Renehan  
Associate Vice President of University  
Development

### **University of Central Florida**

Heather Junod  
Director of the UCF Fund

Bridget Holt  
Development and Alumni Relations  
Officer of the Honors College

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**University of Denver**

Jason Smith  
Director of Parent and Family Giving

**University of Michigan**

Matt Burrows  
Director of Parent and Family Giving

**University of North Alabama**

Haley Brink  
Director of Annual Giving

**University of North Carolina-  
Wilmington**

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**University of Texas at San Antonio**

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**University of Utah**

Erika Marken  
Director, Undergraduate Advancement

**University of Vermont**

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University of Vermont Foundation

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**University of Virginia**

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**Villanova University**

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and Philanthropy





