Engaging your alumni and friends

(DRAFT October 2014)

A guide for chairs, directors, and administrators

by Steve Kean, Chief Advancement Officer, College of Arts and Sciences (CAS)

Engaging alumni and potential supporters can be as fulfilling for your faculty and students as it is for the donors themselves. Connections with interested alumni can lead to increasingly deep and rewarding relationships, comprising not just financial support but also time, energy, contacts, and other intangible benefits. But such relationships rarely just happen. They tend to grow out of complex interactions over time, which build upon effective teamwork among many people. Development professionals refer to the process of developing relationships with friends and alumni that result in financial and other support as “donor cultivation.”

This memo is designed to provide basics on entering the world of development, and especially to describe the ways in which the staff of the Office of Development and Alumni Relations (DAR), can assist you in building relationships with students, alumni, friends, current and prospective donors, parents, corporations and foundations, the local community, and the general public. The goal of DAR is to provide the professional support that facilitates and maintains these productive relationships. A dedicated team of DAR and CAS staff members have special responsibilities to support CAS, including all CAS departments, programs, and other units as we increase awareness, engagement, and support for BU.

When does the process of donor cultivation begin? It begins when a bright high school student, or a successful and focused college senior, applies to BU. It continues throughout the whole experience this person has with BU. The department or program is a focal point for a lot of our engagement efforts because alumni attitudes, even after many years have passed since their graduation, grow out of their experiences in your classrooms, offices and labs. If they look back on that experience with gratitude, fondness, and respect, the likelihood increases that we can convert that emotional support into material support. This process of developing a productive relationship with alumni and friends often involves many people, sometimes over generations.

Six crucial activities are involved in creating and sustaining a successful relationship with our friends and alumni. These activities often arise in a logical sequence, which may or may not involve lots of overlap:

• Imagining the joyful donor
• Communicating the strengths and opportunities of your program
• Identifying key alumni and friends
• Engaging those alumni and friends
• Encouraging distinctive philanthropic relationships (annual, major, and planned giving; and also corporate/foundation support)
• Thanking donors and keeping them engaged

In the following pages, I’ll describe each of these activities, and then conclude with some do’s and don’ts, best practices, and key contact information.
Imagining the joyful donor

Successful philanthropy often begins with an act of imagination: who are we, and what sort of person will derive great satisfaction from supporting us? Who are our potential “joyful donors”?

Of course, this visioning process must be rooted in reality. What do we do that needs and warrants support? What form should that support take? The CAS development priorities broadly reflect those of the individual departments and programs within the College: creating endowed faculty positions, increasing support for graduate students, providing more scholarships and financial aid for undergraduates, increasing discretionary support, and upgrading our existing physical plant or creating new spaces for teaching and learning.

The DAR staff work closely with the dean and, increasingly, department and program leaders to maintain a clear understanding of the funding needs of CAS and its departments and programs. At the same time, we must always keep in mind that it is the donors who decide what is important to them. There is a common misconception that we in DAR “bring donors to the table.” DAR works intensively and extensively to identify potential donors whose interests could directly converge with the particular needs of a department or the College. But successful fundraising is far more often driven by the needs, desires, and interests of potential donors than it is by a preexisting campus need—no matter how compelling that need may appear to us. Throughout the development cycle that is described in these pages, we most often seek to match an on-campus opportunity with a donor who has an interest in roughly that same opportunity. To do this, we must identify, cultivate, solicit, and steward:

- **Identify** potential donors who may be interested in BU, CAS, or specific programs
- **Cultivate** relationships with those potential donors and their key interests
- **Solicit** a meaningful gift that will enhance a program or programs
- **Steward** that gift to reinforce the “joyful donor”

Note my reference above to the “development cycle.” If we are fortunate, the cycle of cultivation, solicitation, and stewardship never ends, because our best supporters will continue to work with us and support us over the years.

You may have paused at the phrase, “joyful donor,” perhaps finding it a strange term. But experience shows that people who engage in serious acts of philanthropy get great emotional pleasure from having made the decision to make a difference through gift-giving. No matter what our own personal resources, most of us should be able to understand that feeling: If you have given a special gift to someone that truly matters to both of you, you feel good.
DAR connections with your department/program

The core responsibility of the three-person CAS team within DAR is to identify and cultivate relationships with alumni and friends of CAS. That effort is based primarily on 1) where they now live and 2) what those alumni and friends studied while at BU.

Each of us is primarily responsible for travel to certain geographic regions of the country, which we tend to do roughly one week out of every month. Taking these two activities together, each of us meets with roughly 100-120 CAS friends and alumni each year. In most cases we make these visits on our own, but if a relationship is advanced enough, or if the interest of the prospect warrants, we involve Dean Sapiro, department chairs, or other faculty in the visits.

We are interested in hearing about your program’s strengths, ongoing alumni/development activity, and potential additional funding opportunities. And we will work with you to produce a brochure that details “our impact/your impact”, a very short template that identifies a handful of key takeaways about the impact of your department/center as well as some opportunities for future support. Occasionally we will have prospective donors who are interested in more specific information about your program. Those are best addressed individually instead of designing material to anticipate many different specific impacts or opportunities.

Involving multiple faculty and staff

Alumni and donor relationships are most successful when they are extended for the long haul. Given the natural transitions of department faculty and leadership over time, we encourage you to involve as many faculty colleagues as possible in the alumni engagement/outreach function in your department or program. Of course many faculty members find it enjoyable to keep up connections with their former students and the alumni of their program. It is also important to think about the skills one needs to become effective in creating productive relationships with friends and alumni. Experience shows that instinct does not always work, and people generally become more effective as they gain experience and even training. This guide is the beginning of what we plan as a series of efforts to assist in that advice and training.
Communicating the strengths and opportunities of your program

Development is all about building personal relationships, sometimes over many years. Ultimately, there is no substitute for in-person contacts. At the same time, a systematic effort to identify and cultivate potential donors is far more likely to be successful if it is preceded by effective and meaningful communications with your alumni.

This requires you to think about your message, your audience, and your distribution channels.

What is your message? What are your strengths?

An excellent starting point is developing a brief page of talking points—sometimes called “bragging rights”—about your program. What are the accomplishments of your faculty and students? What is the impact of your program on BU and the broader community? What is the evidence for the claims you are making about your program and its impact? Most of our best prospects are astute professionals who feel a connection with us in their hearts, but want to see evidence that gives them confidence about their investment in you.

Keep in mind that alumni are often interested in reading stories and updates about fellow alumni. We make every effort to develop this material and get it published in University magazines, but it is certainly advisable for you to develop your own material for inclusion in your newsletters and emails and on your website. How do you find suitable material? One easy way to both engage your alumni and generate this material is to send out a survey asking them about their career, their favorite professor, where they live now, what they’ve achieved, and so on.

Another thing to keep in mind are the “four pillars” that we use at DAR when we are communicating with alumni and potential supporters. To the extent that your story draws upon and reinforces one of these pillars, that may serve your purposes at the same time that it reinforces the messages of the larger University-wide campaign. The four pillars are:

• Explain BU’s unusual financial model (essentially, an uncommonly low reliance on endowment), which in turn illuminates why the University needs support—and why support for BU may produce a great “return on investment”
• Convey institutional “bragging rights”—our past and present strengths—and connect them to philanthropic support, when possible
• Communicate our development priorities (faculty, research, improving the quality of the educational and residential experiences of undergraduates)
• Instill/reinforce a philanthropic tradition—historically, a very modest tradition at BU

When the insider’s and outsider’s perspectives come together in one story, the result can be very effective.
Who is the audience for that message?

In most cases, your program’s alumni are your most receptive audience. That said, you might also think about other individuals or groups with an interest in the work being done by your faculty and students. Are there people with a geographic focus (e.g. New England), a historical interest (e.g. the shoe industry in New England), or a practical, business-focused orientation that dovetails with your program’s work?

Think “sideways,” or one step removed. For example: A group of CAS researchers recently received a small grant from a shoe company to support their study of the human gait. Where might your ideas find a receptive audience, or—in some modified form—find a real-world application?

Also remember that among your alumni, the vast majority of your target audience are undergraduate alumni. Think about their likely interests and experiences when framing your messages. You may see graduate fellowships as crucial to your success, so you want to talk about your graduate program – but how will this relate to your undergraduate alumni?

How do you spread that message?

When it comes to distribution channels, your good message can go in a number of directions.

CAS alumni annually receive five high-quality magazines: three issues of the University-wide *Bostonia*, and two of our own *arts&sciences*. There are several other options, listed below in descending order of difficulty, in terms of getting your materials accepted and printed—although a great CAS story always has a good chance of being published.

The CAS Office of Communications is responsible for taking a leading role in getting the word out about the strengths and successes of CAS, our departments and programs, and our faculty and students. Sharing department news with the Director Jeremy Schwab may help get your stories accepted by the broader BU publications. *CAS News*, the regular newsletter of the college, incorporates these stories and shares them both internally and externally via email. Items included in this summary are among the leads that Jeremy may “pitch” for inclusion in *Bostonia* and *BU Today*, the University’s daily online newsletter. You should also be aware of *Bostonia Extra*, an online version of *Bostonia* that is distributed in the off-months between issues of the printed magazine. *Bostonia Extra* focuses on faculty and student accomplishments, and is always looking for appropriate material—and showing up on search engines may be helpful to your cause.

Alternatively, you may choose to develop your own communication vehicle. The traditional vehicle for communicating with departmental alumni has been a lengthy print newsletter
designed in the summer and sent in the fall. There is no single best format or length for that communication. But if you reflect for a moment on the kinds of materials that you receive from schools, non-profits, and other organizations that you are in a relationship with, you’ll probably agree that there is a trend toward shorter and more colorful publications, not to mention those delivered to mobile devices. People simply have less time to devote to reading about outreach efforts. At the same time, they are bombarded almost daily by solicitations, many of them slickly produced. You have to compete with these short-and-slick materials to get your audience’s attention. You also would be well-advised to speak to different age groups/demographics/interests within each publication. Unfortunately, we generally do not have funds to support additional communications. You might alternatively think about this as an opportunity for a supportive alumnus to support the work of an eager communication effort, possibly provided by capable undergraduate workers?

I’ve already introduced online communications in the context of BU Today and Bostonia Extra. The traditional model of the printed piece is increasingly being supplemented (or replaced) by websites, email and mobile communication. There is help available to you for website development. You can collaborate with Jeremy to transition your website to the WordPress format—on which BU has chosen to standardize, in part because it makes your site much easier to update. The University regularly holds WordPress training sessions, and the software is relatively easy to master.

DAR invests considerable resources in accumulating and maintaining email addresses, so there is room for creative thought about electronic communications such as e-newsletters. For example: we send out a monthly “BU Backyard” email to Boston-area residents, highlighting 15 to 20 interesting events, lectures, and meetings that will be taking place in and around BU. You can request information be added to the “Backyard” email here: http://www.bu.edu/alumni/connected/web-request/backyard/. There’s an equivalent publication for the New York metropolitan area, and additional regional publications are in the works. Finally, an internationally oriented e-newsletter is now being redesigned, and will need content that is of interest to this important constituency. You can make a request to send a broadcast email to your alumni at the following address: http://www.bu.edu/alumni/connected/web-request/broadcast/. There is typically a waiting period of up to two-weeks to ensure that your email fits efficiently into the overall broadcast schedule. Finally, keep in mind that broadcast emails are far from a panacea. For one thing, typical broadcast emails are rarely opened by more than 20 percent of their intended recipients, and we often have email addresses for only half of a particular group of alumni. Because you can’t afford to write off 90-plus percent of your audience, you need to think of electronic communications as part of a bigger picture.

If you are interested in establishing or building your social media presence, we can potentially connect you with the group within central DAR that specializes in that area. You can request assistance in, for example: creating Facebook ads targeted to your constituents, or pushing out
your messages to the BU Alumni Association’s 147,000-plus alumni Facebook fans, 48,3000-plus Twitter followers, and the 162,257 BU alumni on LinkedIn. DAR also has access to smaller, specialty alumni social media feeds that might be a good fit for your news and programs.

**How do you talk about opportunities?**

Philanthropy today is largely about *impact*, as perceived by the donor. In addition to drafting the brief description of your achievements described above, you also should come up with a page documenting the ways that philanthropy would make a difference to your program.

At least in its internal, first-draft version, this summary doesn’t need to be complicated. Simply list a range of gifts from $100 to $1 million, and what impact gifts of those sizes would have (keeping in mind that a permanent endowment generates roughly 4% income on its value each year to spend). And focus on the actual impact that these gifts can, or have, accomplished. We can use this list as a jumping-off point as you think about development activities for your program.

Once you have worked through this list, it is useful to think about how a gift opportunity matches up with conventional philanthropic vehicles and BU-specific gift thresholds. Remember that this language is mainly *internal* in its orientation. Most donors—who are interested in the potential impact of their gift—don’t think in these terms:

- Gift funds can be either **unrestricted**, such as a department’s general discretionary-use gift fund or Annual Fund; or **restricted**, such as when a donor specifies a particular criterion or purpose for the gift (e.g., a scholarship)

- Gift funds can also be either **expendable/current use**, whereby the fund balance is available for immediate use; or **endowed**, whereby the gifts are put into a permanent fund that remains intact and generates annual income that is to be spent each year.

- There are minimum gift levels that are required to establish a new gift fund at BU:
  - Expendable/Current use fund $10,000
  - Expendable/“restricted” fund $10,000
    - Used to either continue to receive more gifts over time or be used over a number of years, not all at once.
  - Undergraduate endowed support $100,000 (scholarship)
  - Graduate endowed support $100,000 (award or fellowship)
  - Faculty Support endowed funds
    - Lecture fund $100,000
    - Visiting Professor $1 million
    - Career Development Professor $1.25 million
    - Professorship $2.5 million (existing position)
    - Incremental Professorship $4 million (new position)
Identifying key alumni and friends

Not surprisingly, your alumni are most likely to be your best contributors. Focusing early and intensively on that population therefore makes good sense.

It goes without saying that a successful fundraising effort is made much more likely with a broad and accurate list of alumni. Research has shown a significant correlation that exists between whether we have information about an individual (phone numbers, email addresses, marital status) and their likelihood of being a donor (Peter Wylie, “A Simple Score”).

With that in mind, you might brainstorm with faculty about former students with whom they’ve stayed in touch, and who may have a deep interest in either the faculty or the program. Some faculty may be leery about sharing these relationships, but history suggests that this concern is misplaced. In fact, mentees often derive great joy from honoring their mentors. Current efforts to raise funds in honor of Tom Kunz (Biology), Howard Zinn (Political Science), Richard Laursen (Chemistry), and Ralph D’Agostino (Math) were all prompted by former students.

You should also have a good sense of who the most popular faculty and emeriti in your department are, and be prepared to call on them for assistance in cultivating relationships with former students who have fond memories of them. We might meet with you, or with a group of faculty, to review lists of your alumni and think about ways that specific individuals might be best engaged. Of course, you and your colleagues will continue to be “in charge” of those relationships, and we in DAR will only proceed along paths with which you are comfortable or where alumni has signaled us to proceed.

It’s important to remember that there are many other ways in which alumni can advance your cause, apart from financial support. They can visit with your students to talk about their career, or give a talk on a special topic. They may be a source of internships or placement opportunities. They might have ideas about potential grant and funding sources. Finally, they might be willing to host or facilitate events, or help build networks with other alumni.

Fundraising starts at home. What does this mean? For one thing, faculty and staff can be regular donors. Emeritus faculty have strong ties to their home departments, and often make financial contributions after retirement or in their estate plans. Our colleagues on the Medical Campus make a special outreach to faculty widows, who often have strong positive feelings toward their spouse’s school. Consider inviting some or all of these groups to your program’s ongoing activities, or consider a special event for this purpose—for example, an annual lunch at the beginning of the year that brings together emeriti and new faculty.

Also consider “friends of the department” as potential donors. Some non-alumni attend departmental events because they find a certain area of study or program interesting. There are also significant numbers of Evergreen students distributed across the courses in the College.
Think broadly about those individuals who stay in touch with you and your colleagues even though they are not former students. They may be a natural audience for your outreach efforts, and may even be a source of financial support.

Timely follow-up is extremely important. Through personal visits and at events, we come into contact with several hundred CAS alumni each year. In some cases, we may come to you with a request for assistance with individual follow-up. This might be as simple as getting an answer to a question about your program, or as complicated as setting up a visit so that the alumnus can see your program firsthand. We understand that this puts a burden on you and your staff, and we will only come to you with this kind of request if the individual has expressed a serious interest in connecting with BU.

In such cases, a rapid response to the individual signals our institutional commitment, and typically reinforces that person’s willingness to participate. Conversely, putting off a response until a time that’s more convenient for you— for example, the end of the semester— can put a damper on their interest. For this reason and others, we greatly appreciate your prompt assistance.

Finally, don’t forget about parents of your current students, and also remember that you have their attention for only a relatively short period of time. At BU, I’ve signed thank-you notes for several $10,000 gifts from parents to specific departments. At a previous institution where I worked, a parent of a graduate student gave $10,000 to provide funds for informal faculty-student gatherings. These gifts are a result of positive experiences that their children are having in your programs. BU has a relatively active and successful parents’ program; let’s work together to reinforce that tradition at CAS.
Engaging alumni and friends

Once you have defined your strengths and opportunities and identified your potential supporters, your next step should be to think about ways in which you might engage those friends.

I’ll point to two engagement strategies and related tactics here; you will certainly think of other techniques for engagement.

Develop events that put your faculty in front of the right people

In many cases, your faculty are your “best foot forward.” You may find that some colleagues prefer to stay close to home. Currently, there are four established platforms that put CAS faculty in front of the local and regional community:

• **Discoveries**: four lectures on diverse topics over the course of the year
• **Arts/Culture/Ideas**: a regular lunch-time lecture series aimed at retirees
• **Gitner Family Lecture**: inaugural session in 2014, highlighting CAS faculty
• **Alumni College**: a new event that was inaugurated in June 2011, with a series of sessions on the general theme of sustainability. The 2012 series focused on the arts and in 2014 we took to the road for an astronomy/Earth & Environment session in Arizona

For those willing to travel farther afield, a general lecture at a BU alumni network event may be the best use of their valuable time. These opportunities usually come to us in the form of requests from individuals or chapters with specific interests. On occasion, there is the possibility of planned travel by your faculty to conferences or research sites that could coincide with alumni audiences.

Further out on the spectrum of involvement, some of your faculty colleagues may be willing to travel with the Dean or the DAR team to participate in events with a specific development purpose. For example: we might invite a faculty member for a talk to assist in the cultivation of a small group of donors, or perhaps we can take advantage of your discipline’s major annual meeting in a city with a significant number of alumni.

In some cases, individual students or student groups may also be helpful in engaging potential supporters. Experience suggests, however, that even the most articulate students benefit from having faculty support and supervision.
Bring alumni to campus

Inviting individual alumni to campus is often the most impactful form of engagement. Alumni feel honored to get the chance to meet with faculty, talk with students, and perhaps give a talk about their career or a special topic. Most alumni expect to pay for their own travel and lodging expenses, so the investment of the department is likely to be limited to planning and follow-up time, and perhaps some internal promotion of the visit, and maybe a meal at a local restaurant.

Alumni are increasingly interested in helping us make clear the connection between one’s undergraduate degree and one’s subsequent career. They enjoy explaining to current students how their college studies came to bear—directly or indirectly—on their professional lives. Liberal arts degrees frequently lead to non-linear career paths, and there is no shortage of alumni who are willing to talk to students and parents about this topic—and, of course, today’s students and their parents are eager to hear about potential career options.

The central DAR group includes several people who can be very helpful in alumni engagement strategies. They include:

- Susan Richardson, the Director who oversees a variety of BU alumni programs, including CAS activities
- Jeff Murphy, her deputy director, also focused on CAS activities, including Alumni Awards
- Sarah Speltz, who is responsible for Discoveries, ACI, and Alumni College
- Vacant position, who is in charge of student/alumni career-related interactions
Encouraging distinctive philanthropic relationships (annual, major, and planned giving; and also corporate/foundation support)

In DAR, our central mission is to cultivate relationships and solicit support. We can only succeed by collaborating with engaged campus partners—like you—who can help us make more interesting/vibrant pitches, full of the human stories that make the “ask” more compelling. It is generally accepted in our trade that it takes an average of seven to nine meaningful contacts with a potential donor before a major gift is realized - and in some cases, many more. Working with a campus partner is really the only way that we can make those contacts meaningful, and move the relationship along.

The same holds true for the other specialized groups within DAR, who either raise specific kinds of gifts or gifts from distinctive constituencies. For example:

**Annual Giving**

BU has an aggressive annual giving strategy. Alumni receive a sequence of a half-dozen or more print and email solicitations over the course of the year. They may also receive phone calls through our Telefund program, and perhaps a personal visit from a member of the team that makes this particular kind of call. All these contacts are intended to encourage gifts to their college’s discretionary fund, or to other funds that they’ve previously supported. These solicitations are most often made in the name of the CAS dean, the volunteer head of the Annual Funds, or a featured student.

The Annual Giving staff also designs and implements fundraising initiatives aimed at specific audiences, or in support of specific goals. A few specific examples include $1,000+ “Leadership Society” donors, “invoice” mailings intended to promote regular giving, and appeals to parents and for athletics. For CAS specifically, these efforts generate annual giving of roughly $800,000 from 4,000+ donors.

Online gifts still represent a relatively small amount of the total dollars raised each year, but that percentage is steadily rising. In many cases, these gifts arrive in response to prompts that donors receive in emails, websites, or newsletters. This underscores the importance of stating your case in compelling and thoughtful ways.

The Annual Giving team is directed by Dan Allenby. Amy Ferguson leads the Annual Giving group that connects with ‘leadership annual donors’ (who give $1,000+ annually) and Hillary Shephard oversees the general mail/email/phone solicitation program.
Major gifts

Our colleague Bill Ring leads a group of nine regional “Leadership Gift Officers.” These LGOs do not work with specific colleges or programs. Instead, they focus on visiting top alumni and friends in their specific regions to cultivate relationships. Pat and I collaborate with our colleagues closely in these geographic areas once we’ve identified individuals who have an interest in advancing their relationship with BU via CAS. In those cases, you might interact with one of our eight colleagues as we provide information, plan campus visits, or prepare a solicitation. Where the Annual Gifts staff is focused on increasing small-dollar support from large numbers of alumni, the Major Gifts staff focuses its efforts on a small number of donors capable of making gifts in excess of $100,000.

Planned Giving

The Planned Giving staff, led by Glenn Vivian, promotes and executes many different estate options for friends and alumni. We collaborate with the Planned Giving team in a variety of ways. They typically visit with alumni who are potentially interested in making an estate gift to BU. They also hold events that promote various planned giving options/vehicles, particularly for audiences of retirees. We may also work with Glenn’s team when they are alerted by a deceased donor’s estate that a gift is going to be made to BU.

In May 2010, BU learned that by the terms of the will of Ernestine O’Connell (CAS’43, GRS’46, SED’58), the O’Connell Memorial Scholarship Fund would be increased by $7.4 million—the largest bequest for scholarships in BU’s history. Ernestine and George had been contributing to the fund since the late 1970s, proving that successful development often takes decades of work!

Corporate and Foundation Giving

The role of the Corporate & Foundation Relations (CFR) office is to build and sustain relationships with private foundations and corporations that have the capacity to support University teaching, research, and outreach at a significant financial level. Working closely with faculty, chairs, and deans, and with the offices of the Provost, Sponsored Programs, Technology Development, and other departments of Development & Alumni Relations, CFR seeks to make effective, coordinated, and authorized solicitations of gifts, grants, and gifts-in-kind.

There is currently a vacant position (formerly held by Michael Dettlebach). This position served as a resource for faculty members throughout the College whose work qualifies for high-level private institutional support. The assistance that was can provided included: 1) identifying funding sources, 2) arranging cultivation meetings with potential and current funders, 3) turning early-stage ideas into fundable research or outreach plans, 4) completing letters of
inquiry, concept papers, and proposals, and 5) gathering required institutional documentation and coordinating proposal submissions. We look forward to renewing this collaboration with CAS once this position is filled.

Kathy Lynch heads up our Corporate Relations team. She collaborates closely with corporate partners that are seeking to deepen their BU connections. Kathy oversees personalized relationships with potential corporate partners based on the intersection of research, innovation, technology and business.

The more actively you get involved in development on behalf of CAS, the more likely it is that you’ll find an opportunity to work with one of these groups or individuals. We do need to have a clear picture of who’s doing what, so please reach out to Steve Kean for help before setting up an initial meeting.
Thanking donors and keeping them engaged

One of the most important things to remember about development is that in many cases, your best prospects are those who have already made gifts to you. According to donor surveys conducted in recent years, seven out of ten donors would definitely or probably give again to the same organization—and give larger gifts—under three conditions:

- The receipt of a prompt, personal gift acknowledgement
- Confirmation that the gift is being or will be used as intended;
- A meaningful update of the “gift at work,” including measurable results, at some later point (Penelope Burke, Donor-Centered Fundraising, 2003).

There are some clear action implications inherent in these three points. For example:

Ensure stewardship of the funds you already have

- Promptly send thanks to donors
- Use your gift funds each year according to the donor’s criteria or intentions
- Communicate with the donors about how you are spending their gifts (by means of newsletters, website, annual reports, etc.)
- Invite donors to visit with recipients or program staff benefiting from their generosity
- Be responsive to development staff who contact you about fund use
- Review, at least annually, the balances of expendable funds and the “available and estimated income” of endowed funds so that you can budget and spend these annually
- Contact Steve Kean if you have questions about any of the above

Thank-you letters

- All donors to any BU fund are promptly sent an acknowledgement from the University that also serves as their tax receipt for IRS purposes
- Gifts of $500-$9,999 also receive a thank-you letter from a CAS or Annual Fund staff person; gifts of $10,000- $25,000 receive a letter from the DAR Vice President; and gifts/pledges of $25,000 or more receive a letter from President Brown. Steve Kean typically sends a note to chairs/directors when a gift of $1,000+ is made to your respective units.
- The central DAR Annual Giving group has recently implemented a program of sending modest tokens of appreciation, along with a thank-you note, to all Annual Fund donors
- We strongly encourage you to also systematically and personally thank donors who make gifts to your departments. Every “touch” with a donor helps the cause, but your thank-you—the communication from the front-line advocate of the donor’s cause—is often the most meaningful of all
What to do, what not to do, best practices, and who can help

As I’ve tried to make clear in the previous pages, successful fundraising is both an art and a craft. Practical experience - at BU and elsewhere—suggests that there are a number of principles that tend to apply in a wide range of development contexts. Many of those dos, don’ts, and best practices have been described in the preceding sections, and are summarized in the following lists along with our contact information. Remember, we are here to help!

Things to do

• Keep us informed of department events and news
• Engage your alumni
• Keep local alumni and their interests in mind. Contact Alumni Relations if you’d like to include alumni in department-led events. AR can assist in marketing the event through their social media and broadcast email methods.
• Ask your alumni to update their contact information whenever you can – send them here: http://www.bu.edu/alumni/connected/directory/update/
• Identify key faculty who can address topics that would make for interesting public talks. Work with us to identify whether there are opportunities for these faculty to speak to alumni audiences, or particular development events.
• Make sure that there is a structure in place to maintain donor-relations activity when chairs or administrators are replaced. If your program is fortunate enough to have current donors, think about involving multiple faculty and staff to keep your momentum building.
• Say “thank you” to your donors!
• Create a one-page, easily updatable description/list of “talking points” about your department: research areas, number of faculty and students, recent honors, and other superlatives.
• Create a brief menu of your department’s priority funding opportunities—ranging from $100 to $1 million—that your development liaison can share with prospective donors. How would gifts of various sizes enable you to become even more outstanding at what you do?
• Look at all the ways your department is currently marketed (in the broadest sense of that term). Do you have a website? Facebook page? LinkedIn account? Are people visiting them? Are your faculty in the news? Are your current students having a good experience? What are they telling their friends back home?
• Help DAR deal most effectively with inquiries/visits from interested friends and alumni
• Keep track of how you have used your gifts
• Work with DAR to craft the strongest possible proposal to potential large-scale donors
• If you have a website, make sure that there is an obvious way to contribute, and have updated contact information for your development contact. Here’s the CAS page as an example: http://www.bu.edu/cas/alumni/giving/
Things not to do

• Contact alumni and friends without first coordinating with DAR. Communication without a clear strategy behind it is doomed to be ineffective.
• Maintain your own databases. (A Balkanized development effort can’t work!)
• Squirrel away your funds for a “rainy day.” The two main reasons why people stop giving are that 1) they are asked to give too often, and 2) they were asked for a second gift before they were told how their first gift was put to use. This argues for spending down those balances, and describing in compelling terms how you spent the money.

Some best practices to contemplate

I don’t advocate that everybody do all of the following. You should play to your strengths, keeping in mind the limited resources of time and money that you can devote to them, and that some of these efforts are years in the making. That said, here are a variety of ways that your CAS colleagues have engaged their alumni and friends in recent years:

• Printed newsletters: Economics (from Bob Margo)

A senior faculty member in Economics is assigned the task of putting the newsletter together. This year, Simon Gilchrist is in charge; previously it was Bob King. A second faculty member, typically an assistant professor, is assigned to help out; usually this person conducts interviews of new faculty members (we always include these in the newsletter). The directors of the MA and BA programs (Hsueh-Ling Huynh and Todd Idson, respectively) are also part of the committee and contribute some text to the newsletter (typically, a summary of events in the past year). Finally, a staff person who is knowledgeable about the production issues is also assigned to the relevant committee; we also typically have a PhD student (or staff person) take photographs. The committee meets in late in the fall (the chair is also present at this meeting) to decide on the topics to be covered in the newsletter. During the spring semester the interviews are conducted and material is assembled. There is a meeting in April during which the first draft is looked over and approved by the chair. The newsletter is then printed in sufficient quantities to be distributed at graduation. At least this is how it is supposed to work! As far as paying for it is concerned, this is done out of department discretionary funds.

• Targeted newsletter: Art History (Pat Hills)

Each year Pat writes a note and collects news bits from her colleagues about activities, publications and awards in the department. A graduate student typically assists with organizing/formatting the material and the finished result is mailed to their PhD alumni. Included in the newsletter is a solicitation that asks the alumni to provide support for graduate student travel, which typically generates a couple thousand dollars per year.
• E-newsletter: History (from Bruce Schulman)

We've gone electronic--with a four times per year electronic newsletter and a separate "From the Chair's Desk" broadcast email to alumni three times a year. See our webpage for examples http://www.bu.edu/history/news-events/department-newsletters/.

• E-newsletter: Sociology (from Nancy Ammerman)

Sara Townsend, our undergraduate programs coordinator, took the lead on this. I did a bit of the writing and some editing and supervising, but she was really the responsible party. I’m delighted DAR is now helping with the production and the actual “mailing.” That piece of thing was, however, the part that took the longest. We worked in the department from roughly mid-October to early-November and thought we were ready to go. From the time DAR first got the material to actual delivery was then about another month. When I came in as chair 4 years ago, we were snail-mailing a paper multi-page document that read like a merged “faculty annual report.” I suspect most went quickly into the circular file. We’re still working on being snappy and more attention grabbing, but it’s nice to know we’ve made progress!

• Online letter from the Chair: Philosophy Department

Since the Fall of 2003, the Department has published an annual update letter from the Department Chair on their website: http://www.bu.edu/philo/people/alumni/chairs-letters/

• Weekly briefing by email and Twitter (from Tim Longman, African Studies Center)

Every Friday we email the African Studies Center Weekly Brief a list of the upcoming Africa-related events at the African Studies Center and the greater Boston community. Subscription is found on the webpage. http://www.bu.edu/africa/about/mailing-list/

• Facebook pages

As of March 2012, Boston University has about 298,000 alumni and 62,000 people “like” BU’s page on Facebook, and 47,000 “like” the BU Alumni Association page. Within CAS, History is “liked” by 866 followers, African Studies by 249, Archaeology by 147 and Economics MA/PhD by 124. Check them out. As of October 2014, the general BU number is now 315,000 alumni with 147,000 ‘likes’.

• Twitter

Or you might follow/subscribe/hashtag one of the 255 active BU Twitter feeds. The BU Alumni Association had 8400 followers in April 2012. As of October 2014, this has increased to 48,300 followers.
• LinkedIn (from Azer Bestavros, Hariri Institute & Computer Science)

In terms of alumni outreach, it is fair to say that after experimenting with all sorts of means, we are converging on using LinkedIn. We created a group “The BU Computing Alumni Network” (http://www.linkedin.com/groups?gid=2853567) and we used that group to invite alumni (using the mailing lists we had from DAR and from our own now-obsolete databases). We also advertised the group a couple of times on our BUCAN Facebook group, on BU’s Alumni Group on LinkedIn, in newsletters we sent, to graduating students, and we have a link to it from our Departmental web page. Our LinkedIn group is “closed” in the sense that other than those I invite, I have to approve requests for joining it. My criterion for “approving” new members is that BU is one of the institutions listed in the education section of their profile (BUCAN is open to any BU alum interested in computing, no matter what department they graduated from).

Needless to say, this is not bullet-proof, so we may have a few infiltrators… And for an annual fee (~ $240) one can upgrade a group to allow more “visibility” into the profile of group members (e.g., current emails, professional career path, people connected to the member, other group memberships).

Note that there is also an official BU LinkedIn page – so that could give you a starting point to find faculty, staff, and alumni who can link to a page for your program. As of October 2014, there are 162,257 BU alumni on LinkedIn.

• Recognize a distinguished alumnus at annual Convocation: Computer Science

Since 2007, a committee of faculty, students and alumni identifies an alumnus of notable achievement. At the department’s Convocation, the alumnus is honored with the award and provides the keynote speech for the ceremony. The alumnus is welcomed to participate in all the department’s activities of the day.

• Alumni Events on the road: Economics Department

“The Economics Department and the Institute for Economic Development cordially invite you to join us for an evening with old friends, lively conversation and new contacts. The Department wants to reconnect with you by hosting an alumni gathering that will include hors d’oeuvres and cocktails. Please feel free to contact some of your college friends and help us spread the word about the event.” Next event will be in Washington, DC in April 2012. http://www.bu.edu/econ/alumni/events/
• Networking series with their MA students: Economics Department (from Bob Margo)

The Economics Department organizes and promotes a group of highly active and networked MA students called the MA Leadership Council. The MALC consists of a number of recent top students from our MA economics program who live in the Boston, New York, and Washington DC metro areas. Council members are actively involved in advising current students (we will be hosting, for example, a career planning event in a few weeks at which the MALC will have a “jobs” roundtable) and also providing feedback to us on our program. The networking benefits alone that are coming from the MALC is proving very valuable to current students; and long-term engagement is promising.

• Lectures, alumni weekend and career networking on campus: International Relations (from Victoria Puyat)

Alumni engagement in our department is mainly through events and lectures that the department hosts. The panel discussion during Alumni Weekend that was sponsored by the IR department had a great turnout. I was told by Kirsten Lundeen that it had the most number of registered participants (about 40) among all the other educational events during Alumni Weekend 2011. Additionally, The Center for IR organizes (either as the sole proponent or in support of IR professors or IR affiliated programs) approximately 25 lectures each academic year. Invitations to those lectures are sent to the general BU community as well as to IR alumni. We do have a newsletter that is still in progress, and a password protected page on our website for job postings geared to IR alumni. I am hoping that our department will plan outreach events that are meaningful to our graduates — how to effectively reach out to recent graduates, those who have been out 5-10 years, etc. is a specific area of our outreach program that we need to define.

• Podcast/videos : concept in progress for future discussion

In 2012, two students working for Pat and Jeremy in the CAS Communications Office produced a 5 minute video with Ashley Mears in Sociology talking about her work on the sociology of the models in the fashion industry. One possible direction would be a website with content imagined and produced by students that featured faculty talking about their research or issues of the day. Not only valuable as a supplement to lecture material, I can envision this as an interesting page to direct alumni to view some featured faculty and topics. A more conservative and controlled approach can be seen at Brown’s alumni association page (http://alumni.brown.edu/learning/podcasts/#cammett) which involves both snippets and full lectures. And ultimately there is the dense content that is available at ItunesU.
From the printed newsletters, through Facebook, to alumni events and podcasts it is important to frame the activities you choose and content you design in terms of the target audience. Is your Facebook page for students, alumni or both? Are you sending your email to undergraduates, graduates or both? Is the story you are writing long and contextual for your older alumni or short, pictorial and with links for younger alumni? There is no single “best” use of your time and dollars to engage your alumni. And given the scarcity of your resources, it is strongly advisable that you think about your audience before you make decisions about which channels to pursue. That said, it takes years to mature the engagement process with groups of alumni, so I would encourage you to get started soon!
Contact information

Many key contacts have already been mentioned in the preceding pages. Here’s a list of my DAR colleagues who may be able to help you in your outreach efforts. If you don’t know the individuals involved, I encourage you to call my office and we’ll arrange an initial introduction. This will help ensure that you get to the right person as quickly as possible.

**Development Team**

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**Alumni Relations Team**

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A final note: I’d like to thank Dean Virginia Sapiro, Jeff Cruikshank, Andrea Kennedy, Caitlan Nee and Maureen Donnelly for their invaluable additions and edits to this document. Their suggestions and edits gave life to what started as a one-page handout.