

Outcomes from research conducted by Barnes & Roche for The Commission to Plan for the Future of University Development at California State University, Fresno.

Participating institutions:

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 - Hudson Akin, Vice President for University Advancement
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 - Rosemary Reinhardt, Interim Vice President, University Advancement
 - Heather Brust, Associate Vice President, University Advancement
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 - Brett B. Anderson, Vice President for University Advancement, Finance & Administration
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 - Shawn Scoville, Senior Vice President for Development & Campaign Director
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 - Robert (Bob) Holmes, Jr., Vice President, Alumni Relations & University Development; CEO, University of Central Florida Foundation
- University of Las Vegas, NV
 - Dr. William G. (Bill) Boldt, Vice President for Advancement
- University of Texas, San Antonio, TX
 - Marjie French, Vice President for University Advancement
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 - Patricia A. (Pat) Borger, Vice Chancellor for Development & Alumni Relations
 - Andrea Simpson, Executive Director, UWM Alumni Association
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Context.

After years of hard work, the *Campaign for Fresno State* will successfully conclude in 2012, achieving the ambitious goal of \$200 million. Congratulations and gratitude are due all whose leadership, generous contributions of time, talent and treasure, and determined efforts made possible the largest fundraising endeavor since Fresno State's founding in 1911.

And then what happens?

A new set of challenges and opportunities awaits the University and all of those responsible for the campaign's success. There are new signals of *confidence*, a higher *expectation*, a deeper understanding of *the value of private support*. Indeed, the campaign's slogan, "Powering the New California," captures a *vision* that is fast becoming a *reality*.

How does the University maintain fund-raising momentum? How does it re-focus and re-tool the advancement program for success in a non-campaign mode? When do fundraisers again approach donors who gave generously during the campaign? How do fundraisers determine how best to start bringing in new big gifts for Fresno State after most cultivated major donors were tapped to help meet the campaign goal? Is the University staffed to provide appropriate and continuing stewardship to current and prospective donors? What is the role of the annual fund? How will Fresno State effectively use volunteers when "campaign mode" concludes? What further investment is required for Advancement Services to provide optimum level service to fundraisers and to donors? Why is it important to continue investing in robust communications when the immediacy of a campaign no longer exists?

And then there's "gearing up" for the *next* campaign!

What worked well in the *Campaign for Fresno State*? What did *not* work well? What lessons can be drawn from the experience? Are there changing patterns of philanthropy that will affect fund raising going forward?

The University's ability to tackle these and other challenges with skill, diplomacy, commitment and vision - even in a culture of economic recession - will make the difference between whether Fresno State keeps moving ahead or plateaus. After all, *the end of one campaign is the beginning of the next!*

Methodology for gathering information from the thirteen (13) universities named above:

Universities selected for qualitative and quantitative research were chosen by the Fresno State administration. Universities surveyed represent both peer institutions in the California State University system and universities to which Fresno State invites comparison.

Qualitative research began with a letter from President John D. Welty to the president of each of the universities named above, explaining the work of the Commission on the Future of Development at Fresno State and asking the presidents to encourage their chief advancement officers to participate.

Dr. Welty's letter was followed within a week by a letter from Barnes & Roche, Inc. to the chief advancement officer at each university. The letter was followed by a telephone call to schedule a phone interview appointment.

All interviews were conducted and reported by William P. Massey for Barnes & Roche. Initial telephone interviews of approximately one hour each were conducted between May 17 and June 8. Copies of interview questions were provided in advance to participants. Information gleaned from telephone interviews is summarized below.

Deep appreciation is expressed on behalf of Fresno State and Barnes & Roche, Inc. for the splendid cooperation of leaders named above and staff at the participating universities who facilitated the telephone meetings.

Not all universities provided responses to every question. The result is that numbers cited with each practice may not add up to thirteen (13), the number of universities surveyed, including Fresno State.

Where direct quotes are used in the report that follows, the purpose is to provide examples, not to value them over other comments.

The source for *quantitative* research was annual VSE (*Voluntary Support of Education*) reports produced by the Council for Aid to Education based on self-reported information from participating colleges and universities.

Five years of selected data categories from VSE reports for each participating university were scanned to provide trend information as follows: total private support (outright and deferred); sources of support; outright support for current operations and outright support for endowment; and alumni giving as a percent of alumni of record and as a percent of alumni solicited for gifts.

VSE information is located in the appendix of this document.

Researcher's general conclusion: The researcher's overall opinion is that organizational and operational structures reported herein create opportunities for robust discussion and exploration of ideas. Overall, the study validates the Advancement Division at Fresno State as in line or consistent with other successful university Advancement programs. Furthermore, the decision to undertake this study was widely admired by survey participants and reflected well on Fresno State's leadership.

1. What trends are evident among surveyed universities in the organization of Advancement/Development operations?

Summary Statement: The overwhelming majority of universities surveyed employ a “hybrid” approach to the Advancement/Development organization. Few are either totally “centralized” or completely “decentralized.” In most operations the central office, or in some cases a foundation, serves the functions of Advancement Services, Planned Giving, Corporate & Foundation support, event planning, communications, and regional gift officers. In one successful Advancement program, fundraising (including planned gifts, corporate and foundation support, sponsored research and donor stewardship) are managed at the *university* level, while the *foundation* manages traditional “Advancement Services,” owns the database, and oversees investment and asset management. At another, all development (including athletic development), alumni, and foundation roles are combined in a single foundation.

Additional comments: All institutions deploy development officers in colleges, schools or units, though not exclusively. The majority of universities surveyed also have at least one major gift officer (or corporate/foundations director or planned giving director) who functions centrally and can be called upon for special development initiatives.

Advancement/Development officer staff positions are funded in whole or in part by the Advancement/Development office.

All respondents to the survey share a common goal of getting gift officers “into the field rather than behind their desks.” For schools surveyed, the reporting relationship of gift officers is a solid line to the senior development administrator or foundation executive and a dotted line to the respective dean or director. “This is to ensure that gift officers’ time is spent on development, not other things the deans can assign.”

“Fundraising is part of the deans’ job description and part of their annual review.” The senior advancement/development administrator, gift officer assigned to a school, and the school’s dean collectively agree upon priorities (usually lead by the dean), development goals for each year, shared responsibility for achieving the goals, and metrics by which success will be measured (may be individualized according to the college/school and the experience level of professionals). Achieving annual goals is part of deans’ annual review as well as the performance review for gift officers. At one university surveyed, both the development office and dean sign an annual development plan, and they are jointly responsible for its success. Twice a year they review and update progress in a meeting that includes the university president, and together determine how the central development office can best help in achieving target goals.

Another university conducts a semi-annual portfolio review at which each major gifts officer reviews his or her entire portfolio. They establish the “Top 10” and “Fab 50” to be

solicited in the forthcoming 18 months. (Proposals can only be open for 18 months; they are automatically closed if not acted upon in that time frame. Major gift prospects are reassigned to a different major gifts officer if there is no action in 12 months.)

One university surveyed reported effectiveness in providing training and coaching to department chairs and institute directors, making them more alert to development opportunities, their potential roles, and university policies and practices surrounding fundraising.

Four (4) universities surveyed have initiated or are considering a centralized approach for major gift officers. While gift officers will have fund-raising responsibilities in colleges, schools and units, they will be housed in the central development office. Primary reasons offered include: (1) ensuring that major gift officers are not sidetracked into non-development activities, (2) more intentionally managing progress toward goals and intervening when appropriate to assist in achieving goals, (3) fostering a sense of gift officers as a “team” rather than “competitors,” and (4) encouraging a greater sense of collegiality among those with similar job descriptions.

The Annual Fund is typically, though not exclusively, managed either centrally or by an alumni organization. Where alumni affinity is strongest with colleges and schools within a university, annual fund programs may exist in the colleges and schools.

Significant change is occurring in the area of Alumni offices and associations. The most striking change is a move *away* from dues paying membership associations to a model in which all alumni (definitions vary by institution) are part of the organization. The most cited reason for the change is the small percentage of alumni who affiliate by membership, resulting in the overwhelming majority of alumni disassociated from their university through an alumnus/a relationship.

Most, but not all, alumni associations are 501(c)(3) nonprofits and report through the development/advancement office or central foundation. Similarly, for universities surveyed, most athletic associations (some of which also have 501(c)(3) status) report directly to the development/advancement office or central foundation.

2. What, if any, precipitating event, challenge or change propelled forward in a significant way the advancement effort?

Summary Statement: Of universities surveyed, robust advancement/development initiatives and capital/comprehensive campaigns resulted from: (1) presidential leadership changes (“Our development effort really got going when our current president came and made philanthropy a priority.”), (2) the need for a first-ever capital or comprehensive campaign, (3) the necessity of responding to a pattern of reduced state funding for public higher education (“Less than 10% of our funding comes from the state”), (4) recognition that a small endowment challenged the university’s ability to remain competitive, and/or

(5) relative placement in national rankings (“Being designated as one of seven emerging institutions had a lot to do with our more aggressive fundraising”), (6) “The decision to hire as full time director of development for each academic unit led to the ‘ramping up’ to a full-service Advancement organization.” Note: the sequence of responses does not indicate a priority order.

3. The extent of on-going capital or comprehensive campaigns.

Summary Statement: Of thirteen (13) schools surveyed, ten (10) are currently in some stage of a capital or comprehensive campaign.

Additional Comments: At five (5) universities, the current campaign is the first in the university’s history. It was noted about one university, “No one expected us to raise the kind of money we did. Thanks to several wonderful gifts, the successful campaign put the university on the map.”

No universities report a failure to achieve their campaign goal.

The average length of a campaign is 7 years.

4. At the conclusion of your current (or most recent) capital or comprehensive campaign, do you plan to (or did you) reorganize, reduce, increase or maintain the same size advancement/development staff?

Summary Statement: No university anticipates shrinking staff at the conclusion of on-going campaigns, and the same is true of universities that have concluded campaigns.

Additional Comments: Universities surveyed acknowledge (1) that the need to continue to secure significant funds will not diminish (“Our goal is every year to raise 10% more than the year before, even during the campaign.”), and (2) the necessity to begin planning for a subsequent “bigger and better” campaign to follow the current campaign.

“The campus and community will expect that fundraising should continue and not be diminished. In light of recent budget cuts, further reductions would be seen as catastrophic.”

Success of capital/comprehensive campaigns, it was observed, “... gave us credibility and confidence in the value of a strong advancement program.” One vice president noted, “*Never waste a capital campaign! Why invest in a campaign and then not build on the campaign structure going forward?*” A vice president reported that 20% of gifts in their capital campaign were “ultimate” gifts; 80% were not, and thus the donors can be cultivated for future gifts.

Generally, chief development officers anticipate adding and/or redeploying staff post campaign based on some of the following indicators: (1) adding development officers in colleges/units that are doing very well, (2) adding regional development officers in key alumni/prospect population centers, (3) re-directing and re-focusing efforts identified as ineffective or lacking sufficient support, (4) filling positions left vacant due to budget restrictions, (5) enhancing “back room” operations, especially in prospect research and stewardship, (6) bringing “outlier” groups more “under the tent,” and (7) acknowledging that annual funds, the essential “front door” for alumni, have been significantly neglected or relegated to nothing more than telemarketing during campaigns. “We will plateau if we can’t increase staff.” Note: sequence of items does not indicate priority.

Donor retention was cited as a significant challenge that must be addressed. It requires 4.5 times more effort to *acquire* a new donor than to get a *renewed* gift.

Strengthening and growing development staff presents the challenge of locating funding sources for operating support.

5. Funding for the advancement enterprise.

Summary Statement: All public universities are experiencing two simultaneous concerns: (1) reduction in state appropriations, in some cases accompanied by a lack of flexibility to direct those appropriations within the university, and (2) a reduction in alumni giving.

Additional Comments: The percent of institutional (state) support for advancement efforts at surveyed universities ranges from a high of 86% (a California State University system institution) to a low of 16% (a university not in California). The average institutional support for advancement/development is 52%. (It must be kept in mind that “advancement” has slightly different definitions at various universities ~ for example, at some universities it includes publications and communications; at others, it does not.)

Other funding sources reported by universities participating in the Barnes & Roche research for Fresno State are:

Unrestricted gift funds. As much as 14-15% of the advancement budget at five (5) universities surveyed.

Gifts restricted for Advancement. 2% of the advancement budget at one (1) university.

Unrestricted endowment income. As much as 7% of the advancement budget at three (3) universities surveyed.

Investment earnings or “cash float” on non-endowed restricted funds: As much as 33% of the advancement budget at four (4) universities.

Endowment management fee: Fees range from 1.24% - 5% at nine (9) universities surveyed. Percent of advancement budget averaged 23% at three (3) universities.

Gift fees: Fees range from 1% - 6% at eight (8) universities surveyed. Percent of the advancement budget ranges from 8% - 75% to undetermined. (Note: policies at some institutions provide for exemptions from fees; some policies place a cap (ex.

\$2 million) on gifts that are charged the fee.)

Revenue from real estate under management: 30% of operating budget at one (1) university where the foundation owns office buildings and student housing that the university contracts for use.

Annual Fund gifts: 15% at one (1) university where all gifts secured through telemarketing support development operations.

Other: Direct allocation from the foundation funded approximately 13 - 15% of the overall Advancement budget at three (3) universities; 25% of all phonathon gifts collected at one university support development operations; 100% of temporary investment earnings ("float") on all non-endowed funds.

An interesting comparison is reflected in the working draft of a 2010 CASE (Council for the Advancement & Support of Education) national survey of foundations affiliated with Master's institutions. The most common funding sources for the 37 responding foundations were: (1) a management fee on endowed funds - charged by 73% of surveyed universities; (2) unrestricted gift funds - assessed by 59.5% of surveyed universities; (3) investment earnings or "cash float" on non-endowed restricted gifts - utilized by 45.9% of surveyed universities; and institutional support - received by 37.8% of surveyed universities.

With an eye to the *amount contributed to the overall advancement budget by various sources* for the 37 foundations reported in the CASE working draft, unrestricted gift funds represented an average of 25.6% of budget income, followed by a management fee on endowed funds for an average of 24.3%, and institutional support at an average 16.8% of the foundation's operating budget.

6. What is the average number of prospects in a major/principal gift officer's portfolio?

Summary Statement: The average number of prospects in a major/principal gift officer's portfolio is 129.4. The scale ranges from 80 to 175. This number encompasses the development pipeline and includes identified, researched and qualified, cultivated and solicited prospects.

Additional Comments: Metrics for evaluating major/principal gifts officers' success reflect both transactional and relationship development models. Performance indicators tend to vary by the college/unit assignment and the experience level of the gifts officer. Metrics are often customized and set in a range that accommodates individual differences. "Each major gifts officers has about 100 prospects at various stages of the pipeline at any given time. Twenty five visits - not phone calls - are required each month." "The number of prospects varies from college to college since some do not have large prospect pools, while others have extensive prospects." "We require that each major gifts officer report on fifteen (15) cultivation or solicitations face-to-face visits as well as five (5) 'discovery' calls per month."

While the number of prospects in a single portfolio generally does not include stewardship of life-time donors, “permanent stewardship” responsibilities most often remain with the assigned major/principal gifts officer assisted by donor relations staff in Advancement Services.

Traditional indicators of success cited include: achieving goals regarding number of contacts, visits, proposals developed, solicitations at a minimum dollar range, successful solicitations, and closings. “Moves management” software or “Dashboards” help track contacts, “dollars in the door,” and “assists” (helping another development officer secure a gift) at a number of universities. (Note: sequence of items does not imply priority.)

Two universities removed dollar goals as a metric to focus more on face-to-face meetings with prospects, moves management, tearing down “silos” and developing a culture of the development operation as a “team.”

An issue identified at several surveyed universities is “competition for credit” among gift officers, leading to a fractured sense of the “development team.” At one California university, all fundraisers have responsibilities to the “team” as well as to the college they represent. Additionally, at another university, planned gifts are credited to the school gifts officer collaborating with the central development office’s planned giving director.

One (1) university noted that, “Directors of development are intended to be major gift officers but, in fact, their duties go beyond that function. The proportion of major gift work varies by unit, with some college/school assignments at only 50%.”

7. The extent of regional gift officers as part of the overall advancement and development operation.

Summary Statement: One (1) university surveyed has major gift officers deployed in key population centers. Two (2) other universities have “regional councils” (“Key volunteers and foundation directors work with a central development officer and the alumni office.”) or university-based major gifts officers assigned to specific geographical regions.

Additional comments: Many universities surveyed report that an overwhelming majority (75-83%) of alumni reside within proximity to the university making regional gift officers unnecessary. The one university with regional gift officers reports that they will add nine (9) additional regional gift officers to the existing four (4) at the end of the current campaign, and that “regional gift officers have significantly turned up the dial on alumni engagement.”

One (1) university that does not have a concentration of alumni outside of the state successfully utilizes a “road warrior” who focuses on different regions of the state and who coordinates with the alumni team to help identify prospects and leads. Several other universities surveyed devote alumni staff to regions.

Whether university- based or region-based, regional gift officers represent the entire university rather than a single school or unit.

8. Trends among surveyed universities regarding the relationship of the alumni office and the advancement/development operation, including the structure of the alumni office, its fund-raising role, and whether there is a student alumni program and/or a senior class giving program/student philanthropy program.

Summary Statement: Alumni operations at all but three (3) universities surveyed function as 501(c)(3) nonprofits reporting to the vice president for development or advancement. Those that are membership organizations serve from 2% (least) to 9% (most) of alumni constituents as defined by the institution.

Additional comments: Aside from dues income (increasingly a one-time fee or “lifetime” membership) other sources of support for alumni organizations include: institutional support, foundation support, a phone-a-thon (creating the situation of a “double ask” during each fiscal year), special events and activities (auctions, races), magazine advertising revenue, designated gifts, and affinity programs (credit cards, insurance, etc.). (Note: sequence does not imply priority.)

While many alumni associations raise funds, most often for alumni scholarships or new alumni centers (capital projects), the trend is transitioning *away* from fundraising and to service providing, especially in the areas of “...high visibility, high impact programs.” Alumni wishing to support the Alumni association financially at one school can continue to become “life members”; at another university they can request that a percentage of their annual gift be designated to the Alumni office.

Two (2) universities surveyed are moving their Annual Fund from the central development office to the Alumni office. Obviously, this move will position the Alumni office as a fund-raising *in addition to* a fund-raising operation.

Key functions of Alumni associations include: advocacy with legislative and other elected groups; alumni engagement programs, including life-long career services; social media; publications (magazine, newsletters); legacy scholarships; alumni center capital projects. (Note: sequence does not imply priority.)

Seven (7) surveyed universities have Student Alumni programs. Of five (5) that do not, two (2) are planning to add a student alumni program, one (1) is phasing out an unsuccessful program, and two (2) simply do not anticipate such a program.

Eight (8) surveyed universities have a Senior Class Giving Program or a Student Philanthropy Program in various stages of maturity. Of five (5) schools that do not, three (3) reported that they plan to start such a program. Universities surveyed with successful Senior Class Giving Programs describe them as an investment from which they expect little immediate return. Their purpose is to instill the inclination to support *alma mater* as a “pleasurable habit.” “Since only 7% of our alumni are donors, we have a lot of work to do, and we need to begin the investment when students are on campus.”

Successful Senior Class Giving programs often are collaborations among development (often the annual fund), student affairs and the alumni office. Challenges to Senior Class Gift programs include the breakdown of traditional class identification among students, the extended time required for completion of degrees, the non-residential (commuter) nature of a number of some universities surveyed, the age of the student population (non-traditional aged students are less inclined to think in terms of their “class” year), lack of dedicated staff for the program, and students increasingly holding the university responsible for student debt that they have accumulated. (Note: sequence does not imply priority.)

9. Functions cited as included in Advancement Services.

Summary Statement: Overwhelmingly, Advancement Services is a centralized operation either in the development office, foundation, or alumni office. No university surveyed has, or contemplates, a decentralized Advancement Services operation.

Additional Comments: At one (1) university, the foundation’s Advancement Services handles all financial areas while the development office’s Advancement Services handles research and discovery, prospect management, data and IS management. Advancement Services at one state university also manages/monitors/ensures compliance with system policy. Otherwise, Advancement Services is a relatively standard component of a development operation.

10. If there is a key foundation, what are its principle responsibilities, how does it related to the advancement/development operating budget, and how is it governed?

Summary Statement: Because of history and the growth of universities, there is enormous variance in the number, governance, composition and responsibilities of foundations and their boards. There is no single “best practice” for foundation functions, responsibilities, or operations.

Foundations typically function to manage and invest endowed, and in some cases non-endowed, funds, to determine annual pay-out rates, to oversee the foundation's annual audit, and to assist in securing principal gifts. At one (1) university surveyed, the foundation includes oversight of sponsored research. (They are in the final stages of creating a new foundation to focus exclusively on philanthropy.) Several universities have separate foundations to manage real estate holdings, thus avoiding the possibility of putting at risk assets of the philanthropic foundation.

Additional Comments: Most surveyed foundations are staffed by the Vice President for Development, an Associate Vice President for Development or, in several cases, a separate Executive Director of the foundation.

Foundation board members generally are stewarded by the university president and the chief development officer. Board membership ranges from five (5) members to sixty (60) members, and most foundation boards are deemed to be prestigious. Directors are selected because of their position in the community, major gifts and potential for major giving, influence, and access to capital. Term limits are customary to ensure healthy board rotation on a staggered or "class" model.

More than half of foundations surveyed have written job descriptions for directors with clear expectations for service and giving (Ex: "minimum \$5,000/yr. annual gift and a major gift commitment commensurate with ability"). In other cases, expectations for giving and service are inferred rather than stated.

While several foundation boards receive and approve annual development budgets, this overwhelmingly is for transparency purposes. Budget requests are reviewed for information purposes only from the perspective of *capacity* rather than evaluating operations. The majority of foundation boards are not involved in the fundamental operation of the development office. "They do not drill down into or pick apart the budget request."

Among universities surveyed, athletics typically does not have a separate fundraising foundation; when there is a distinct athletic foundation, it most often reports as part of the advancement/development operation. Database issues relative to ticketing and "points" are not uncommon.

Of universities surveyed, one (1) operates with no foundation. In that case, the state system hosts a foundation that provides services to all campuses.

At one (1) university surveyed, all development, alumni, advancement services, and athletic development are part of the central foundation.

For other surveyed institutions it is most typical, and generally required by statute, for any and all foundations to report through a single principal foundation. Where two (2) main foundations exist, one (1) is typically for real estate holdings or for sponsored research; the other is for philanthropic support.

11. **What is the relative importance of planned giving to your advancement program and/or campaign, and how does it function within your advancement effort?**

Summary Statement: Nine (9) universities surveyed reported strong planned giving efforts. Three (3) universities indicated that planned giving currently does not occupy a high priority in their development program. Two (2) of those stated that, as relatively young universities with as much as 50% of alumni graduating since 1990, planned giving will *become* a focus program in the future.

Additional Comments: Comments representative of universities with robust planned giving programs include: “Our proactive planned giving program is responsible for the increase from 100 to 700 known estates. We have 3,900 prospects identified.” “Planned gifts are the largest single source of our long-term gifts.” “One third of all annual income is from planned gifts committed.” “One fourth to one third of our gifts received are planned gifts.” “Planned giving is of huge importance.”

Planned giving staff in the central development office typically work in tandem with major/principal gifts officers in schools, colleges and units. In most cases, all development officers receive regular (monthly or quarterly) professional development provided either by outside vendors or by planned giving staff. Training is “...to enable development officers to recognize situations where a planned gift might be appropriate and to contact a planned giving officer.”

In universities with highly successful planned giving outreach, the effort is a proactive one. A planned gift is acknowledged to result from a donor’s genuine desire to help the university coupled with a trusting relationship with the planned giving or principal gifts officer. While most surveyed institutions focus their planned giving program on prospects aged 55-85, universities are recognizing the value of being cited in estate plans of prospects from age 40.

Several institutions surveyed have special programs to engage *retired* faculty and staff in giving through a planned gift.

Of universities surveyed, four (4) have three (3) or more dedicated planned giving officers plus support staff.

12. Because each of the following demographic traits has been demonstrated to affect alumni long-term attitudes toward involvement and support of universities, please provide your best estimate for the items below:

(Note: Numbers are approximate only. Some interviewees acknowledged that they did not know the information, were providing a “best guess,” or that the university does not collect the data.)

Percent of traditional age (18-24) undergraduate students enrolled: average 66.1%
High: 100%; Low 22.5%

Percent of undergraduates residing in university owned or operated housing: average 21.4%
High: 58%; Low: 5.9%

Percent of undergraduates engaged in Greek life: 6.4%
High: 10%; Low: 0%

Percent of undergraduate students identified as “first generation” college students: 37.7%
(several schools do not track)
High: 67%; Low: 8-10%

Percent of students who work 20+ hours per week: average 50.5%
High: 80%; Low: 20%

Percent of students graduating students who entered as freshmen: average 53.5%
High: 75%; Low: 37.8%

Percent of undergraduates who have a parent, sibling or relative who attended the university: unknown. Most do not track
High: 40%; Low: 1.3%, unknown or do not track

Percent of undergraduates who utilize services of the office of career planning: 52.6%
High: 80%; Low: 28%

Percent of undergraduates who graduate within 6 years: 58.8%
High: 80+%; Low: 26.3%

Percent of entering students indicating the university they are attending was their “first choice” university: average 72%
High: 90%; Low: 50%

Conclusion

The sharing of experiences, wisdom, lessons, successes and failures among universities surveyed is evidence of the enormous capacity for collegiality demonstrated in higher education. The capacity to witness and understand experiences of others through filters of institutional culture, history, and contemporary challenges is a distinguishing trait that enables institutions to grow, to develop authentically, and to celebrate their mutual successes.

Organizational and operational structures represented by universities participating in this research reflect both traditional *and* emerging practices by seasoned professionals as well as by new professionals being welcomed into the field.

What is a best practice?

What is the *correct* mission for a university? What is the *right* size for a university? What is the *best* way to teach? Who is the *ideal* student? What are the *best* majors? What is the *best* way to organize alumni to act on the university's behalf?

Participants in this survey proffered deep understandings of circumstances at their universities that cause the answer to the question, "What is a best practice..." to be restated as "What is a best practice *for whom?*" Accordingly, the overwhelming "take away" for the interviewer was affirmation of the contemporary saying, "One size fits *none*," coupled with the ancient wisdom, "Know thyself."

Attention must be paid to differences that shape institutional response to its Advancement effort. Of universities surveyed, total alumni of record range from over 235,000 to about 65,000. Contributions in 2010 from alumni of universities surveyed came from a range of 24.33% to 4.79% of alumni solicited for support. Capital or comprehensive campaigns were in the planning stages, kicking off, in the "quiet" phase, beginning the public phase, wrapping up, and/or celebrating success.

Budgets are being slashed, "champions" are being discovered both within and without the institutions, staff are stretched beyond capacity, volunteers are "stepping up to the plate" in new and profound ways, and the changing faces of students and alumni are challenging development leaders to understand and embrace philanthropic traditions and patterns of multiple cultures.

Class structure (entering freshman to graduating senior in four years) has devolved. Students working more than twenty hours per week, either to afford their education or to afford their life style, sacrifice the traditional "robustness" of the undergraduate college experience. The social contract that once stated a job awaited every college graduate is broken. While some media freely doubt the value of a college education, students and families are compelled to amass increasing debt to pursue the "American dream."

Each of these factors and countless more that leaders responding to this survey listed, help to explain the appropriateness of wide differences in approaches to University Advancement at public colleges and universities across America.

And yet, optimism and strength, determination to command the future rather than be commanded by it, is the bold decision taken by each university leader in this survey.

Responses collected and aggregated herein reflect astute, serious, thoughtful attention to creating a culture of philanthropy that is sustainable, ethical, generous, and rewarding for both donors and universities. Among responders to the survey, several shared traits emerged: the willingness to question and to change, to relinquish the hold of the past; to use technology to its fullest as a *tool* of advancement, not as a *substitute* for people; and with frankness and optimism to acknowledge that public funding will never again bridge the difference between what we are and what we aspire to become.