ADVANCEMENT: OUR SHARED QUEST

FIVE STEPS TO GET STARTED

Presented by:
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AGENDA

1. What is Advancement/Philanthropy?

2. Who does what?

3. Five Steps

4. Successes
WARM UP

• What did you come to learn today?
• What is Advancement/Philanthropy?
• What role do Academics/Chairs play?
• Have you done this before? (Share stories)
• Debunking myths and fears
mission statement

To inspire and engage people in philanthropy to advance the University of Waterloo in becoming one of the world’s top innovation universities.
FIVE STEPS

1. Meet your Advancement team

2. Know your fundraising needs & priorities

3. Know your constituents – alumni & donors

4. Know your current funding sources (i.e. endowments, trusts)

5. Leverage opportunities
YOUR ADVANCEMENT LEADERS

AHS – Wanda Deschamps

Arts – Kim Bardwell
   School of Accounting & Finance – Sheilaah Guthrie

Engineering – Martha Nelson & Nenone Donaldson

Environment – Maryam Latifpoor-Keparoutis

Math – Ingrid Town

Science – David Timms
   School of Optometry – Andrea Carthew
   School of Pharmacy – Mary Stanley
ROLES

Dean (Chief Advancement Officer)
- Vision/Mission
- Liaison to University Leadership

Academic Head
- Expert witnesses
- Provide details of programs, etc.

Advancement:
- Expertise in fundraising strategy
- Coordination - “Moves manager”
FUNDRAISING NEEDS & PRIORITIES

What are Fundraising Priorities?

• Aligned with Strategic Plan
• Identified and advocated by champions
• Approved by Dean
• Articulated to Advancement Teams

University-wide

Faculty and Department specific
KNOW YOUR CONSTITUENTS

Start with your students- their experience and engagement as students will translate into their engagement as alumni and donors.

Who are your alumni?
• # of alumni, what do they do?
• # of alumni donors
• Top 10 donors to your program area
• What have they supported in the past?
• What can they do for you? What can you do for them?

Ask for a profile, build and sustain relationships
SOME SUCCESSES

Dorothy Dowling Alumni Award Celebration

Dean’s Reception 2016

Grad Formal 2017

Office of Advancement
SUCCESS

• Strong relationships
• Pride
• Giving drivers
• Strategy
• Execution
• Teamwork
“Individual donor characteristics, fundraising practices, external environment, and institutional characteristics.”

(Gunsalus, 2004)
**Potential Leaders**

*3346 Alumni (3%)*
- % who have donated: 64%
- Average # of gifts: 7
- Average Lifetime giving: $737
- Total giving as a group: $2,465,014
- % of Total Giving Pool: 2%

**Leaders**

*1248 Alumni (less than 1%)*
- % who have donated: 96%
- Average # of gifts: 48
- Average Lifetime giving: $94,897
- Total giving as a group: $118,431,030
- % of Total Giving Pool: 78%

**Sleepers**

*128,823 Alumni (87%)*
- % who have donated: 30%
- Average # of gifts: 2
- Lifetime giving: $158
- Total giving as a group: $20,331,979
- % of Total Giving Pool: 13%

**Champions**

*12,481 Alumni (9%)*
- % who have donated: 48%
- Average # of gifts: 12
- Lifetime giving: $819
- Total giving as a group: $10,219,003
- % of Total Giving Pool: 7%
SUCCESS

- Strong relationships
- Pride
- Giving drivers
- Strategy
- Execution
- Teamwork
THANK YOU & QUESTIONS