

## **September 18 College and Campus Chairs' Meeting**

### **Summary of Morning Discussion**

#### **Pat Roenigk, Presenter**

The essence of what we do as fundraisers is the gathering of information – information that will eventually be used to help us make the best possible solicitation.

We recognize that the process is a marathon, not a sprint, and that we need to hone three foundational skills to be successful:

- The ability to ask open-ended questions that are intended to get the prospect talking about themselves and their passions. (The article shared in advance of the meeting provides examples of questions that you might use to elicit information, but there is no script to follow.) We are engaging in conversation, but it is directed conversation with the goal of gathering information. Volunteers and deans can often gather information that a donor will not share with a development officer.
- The ability to listen for cues and clues that suggest capacity to make a gift, cultivatable interest in the University and the removable obstacles that might stand in the way of a gift. “I would be willing to make a gift to Penn State, but...” While Penn State may be important to our donors, a donor is generally only willing to provide for Penn State’s needs only after they have met their own needs and the financial needs of their families.
- A disciplined approach to recording and sharing information that allows us to truly strategize.

Everyone has a role to play. When Penn State first started fundraising in the mid-80s, there were volunteers, but the day-to-day work focused around the professional fundraising staff. During the Grand Destiny Campaign, we truly expanded that workforce by the increased use of volunteers and the academic administration.

We reach out to so many alums. We are all engaged in asking those questions, listening and learning about our donors and their passions for Penn State and that information is getting back to our records. We use volunteers and deans at all phases from introduction through assessment, cultivation and stewardship. We are increasingly reaching out to department heads, faculty, and volunteers – showing them how to do this, as well.

An important role of the volunteer chair is to recruit committee members and often good candidates hesitate because they are not comfortable asking for money. It is important to recognize that volunteers are adding value to the development process in many ways, and not all ask for money:

- Volunteers assist in connecting us with prospects we wouldn't otherwise hope to meet
- They host events
- They serve as spokesmen and articulate the case for the University and their units
- They make their own gifts and inspire others by allowing us to strategically announce and publicize those gifts

Every unit is unique – the basic elements are all the same, but each committee has its own dynamic that will be dictated by the skill set of the individual committee members, the nature of the prospect base, and the size and demographics of the pool of prospects.

Panel members representing a variety of units participated:

- Jane Zimmerman, a long-standing volunteer who served, among other roles, as the chair of the development committee in Outreach
- Jack Burke, Chancellor at Penn State Erie, The Behrend College
- Susan Welch, Dean of the College of the Liberal Arts
- Mark Sharer, Director of Development for the College of Agricultural Sciences

The panel members shared information on their units and the way in which their volunteer committees have been structured. Dean Welch described a large committee that had been divided into subcommittees that mirrored many of the University's central functions, while Mark Sharer noted that his committee operates as a single committee. Dean Burke and Jane Zimmerman shared some of their experiences in working with local volunteers and approaching prospects that may already be working with another unit. Jane stressed that she is a volunteer that likes to ask for money. The audience asked questions of the group and they related their personal experiences and differing roles. Each offered to answer additional questions at any time.